Client Services

Table of Contents

Why Can't I Access a Screen?

You can only access screens that your user sign on has been granted access to. This property is referred to as *Permissions*. Use the table below to find the screen you need access to and determine the Permissions that are needed. To solve this, you need to discuss this issue with your system administrator to have the Permissions changed.

To access *Permissions:*

1. Follow this path: **Administration ▸ User/Role Setup ▸ Role Definition.**

   The *Role Definition* page is displayed. View field definitions.

From the *Permissions* page, you can:

Determine Which Permissions Are Needed for the Client Services Pages

Determine Which Permissions Are Needed for the Client Services List Page

If you can't access this screen...	You Need Permission Type	Parent	Permission Item
Client Summary	Banners	Client	Client Summary (Client Summary)
Services/Notes	Banners	Client	Services/Notes
	Screen (New Mode)	Services/Notes	Export
	Screen (New Mode)	Services/Notes	New
	Screen (New Mode)	Service Detail	Delete
	Screen (New Mode)	Service Detail	New
	Screen (New Mode)	Service Detail	Save
	Screen (Upload Mode)	Services/Notes	Export
	Screen (Upload Mode)	Services/Notes	New
	Screen (Upload Mode)	Service Detail	Delete
	Screen (Upload Mode)	Service Detail	New
	Screen (Upload Mode)	Service Detail	Save
	Screens	Client	Add Other Signer
	Screens	Client	ClinicalSummary
	Screens	Client	CMClinicalSummary
	Screens	Client	PMClinicalSummary
	Screens	Client	Comments Interface
	Screens	Client	Service Detail
	Screens	Client	Sign Note
	Screens	Client	SignaturePage
	Document	Codes (Edit)	ClinicalSummary
	Document	Codes (Edit)	Service Note
	Document	Codes (View)	ClinicalSummary
	Document	Codes (View)	Service Note

Client Services

Manage Services for a Client

From the *Service Detail* page, you can:

Add a Service to a Client

Change a Service for a Client

Delete a Service for a Client

Move Documents

Print a Clinical Summary

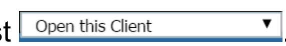
Copy Service

Reschedule a Client

Schedule a Follow-up Service for a Client

To Add a Service to a Client

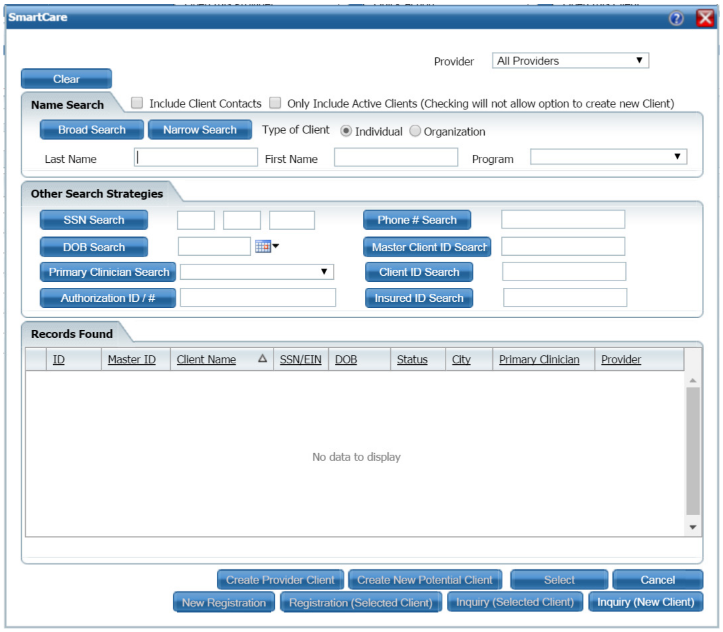
1. Display the client you want to work with.

a. To display a client, click the **Open this Client** drop down list 

.

b. Select the **<Client Search>** option.

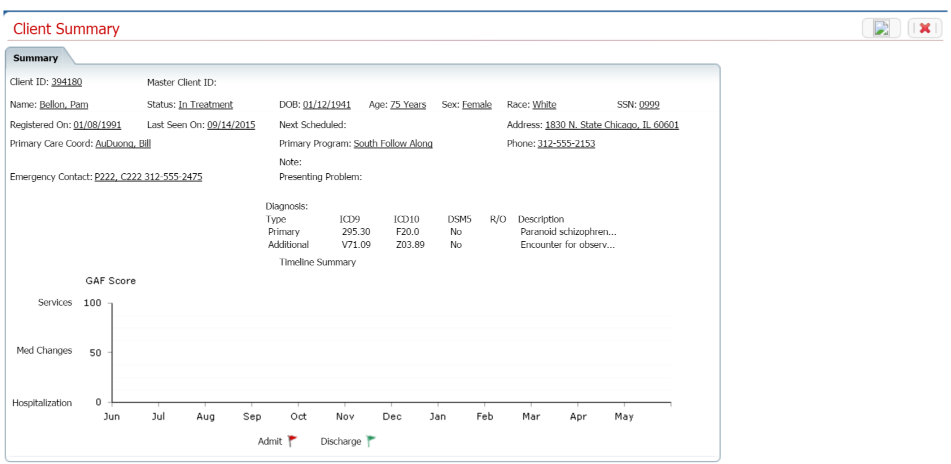
The *Client Search* window is displayed. View field definitions.



2. Search for the client you want. Tell me how...

3. When the client you want is displayed and selected, click the **Select** button.

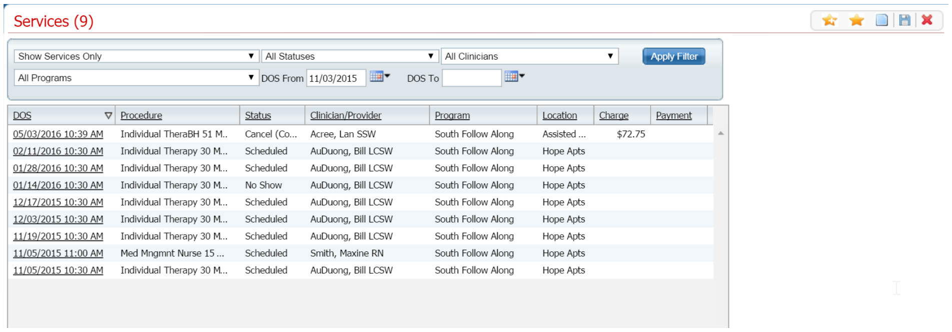
The *Client Summary* page is displayed. View field definitions.



4. Notice that a *Client* tab is displayed to the right of the *My Office* tab. The tab displays the client's last name, first name and the client ID in parentheses.

5. Select **Services** from the *Client* banners.

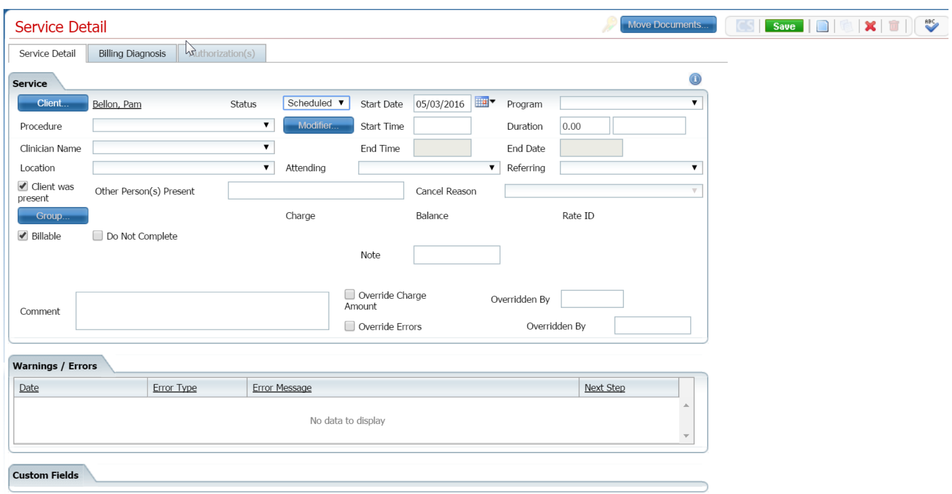
The *Services (#)* window is displayed. View field definitions.



6. Filter the list to determine the records that are displayed. Tell me how...

7. To add a service to the client, click the **New** item  icon in the task bar.

   The *Service Detail* page is displayed with the *Service Detail* tab active.

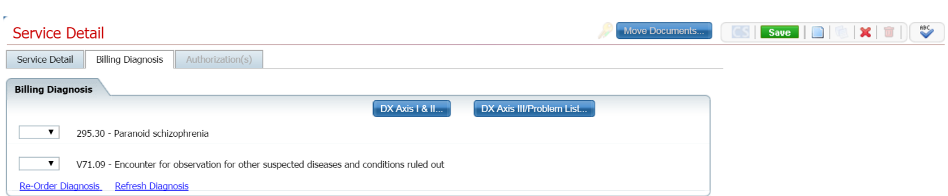


8. Complete the **Service Detail** tab for this service. View [field definitions](#).

9. Click the **Save** button.

10. Click on the **Billing Diagnosis** tab to make it active.

    The *Billing Diagnosis* tab is displayed.



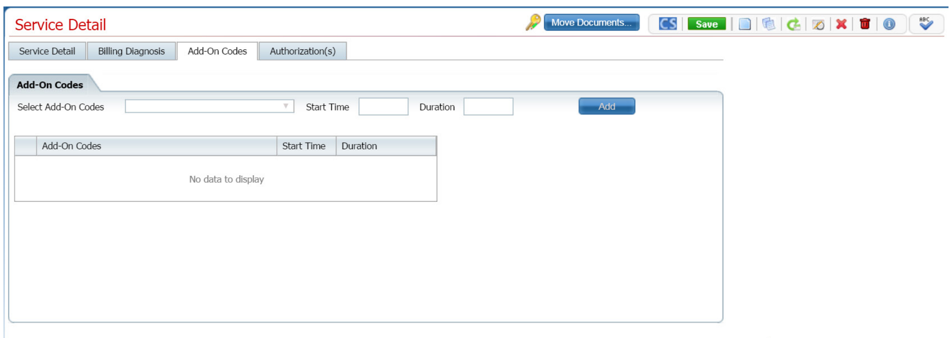
11. Complete the **Billing Diagnosis** tab for this service. View [field definitions](#).

12. Click on the **Save** button.

13. If you added a procedure code on the *Service Detail* tab that is set up with add-on codes, the *Add-On Codes* tab is available on the *Service Detail* page..

14. Click the **Add-On Codes** tab to make it active.

The *Add-On Codes* tab is displayed

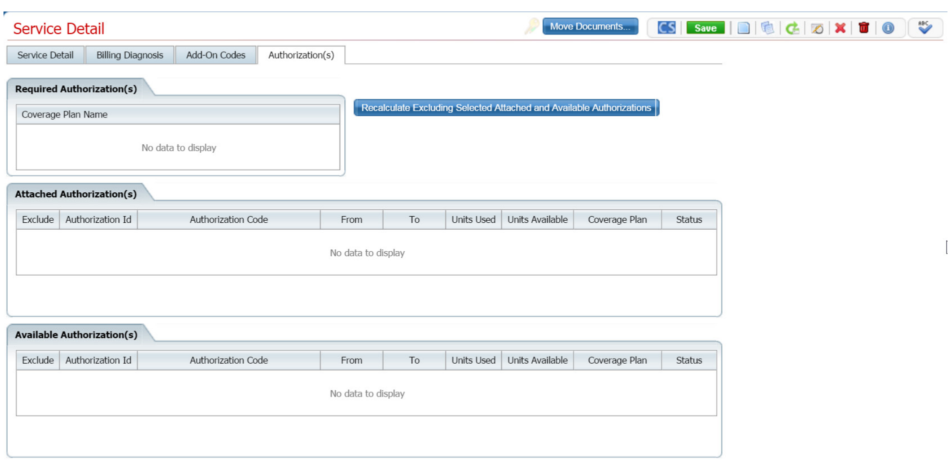


15. Complete the **Add-On Codes** tab, if needed. Tell me how... View field definitions.

16. Click on the **Save** button.

17. Click on the **Authorization(s)** tab to make it active.

The *Authorization(s)* tab is displayed.



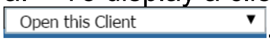
18. Complete the ***Authorization(s)*** tab. View field definitions.

19. Click the **Save** button.

20. Click the **Exit** icon ✖ to return to the *Services* list page.

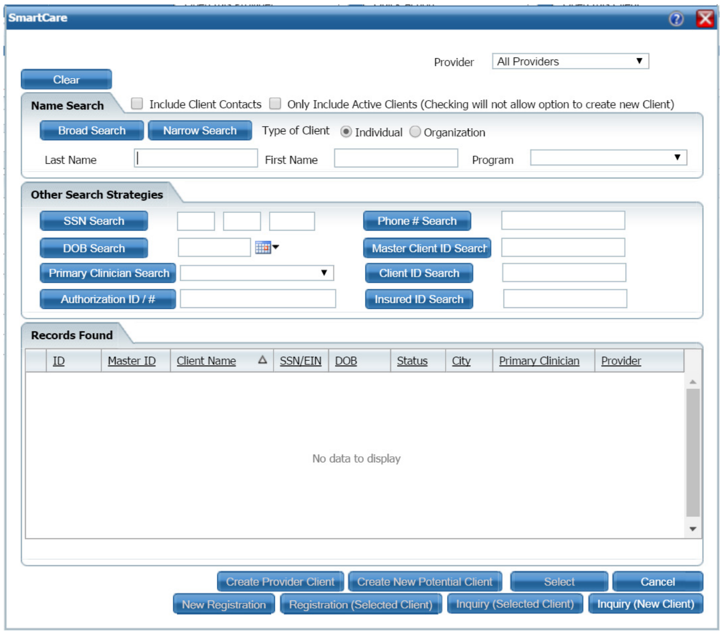
To Change an Existing Service for a Client

1. Display the client you want to work with.

    a. To display a client, click the **Open this Client** drop down list 
.

    b. Select the **<Client Search>** option.

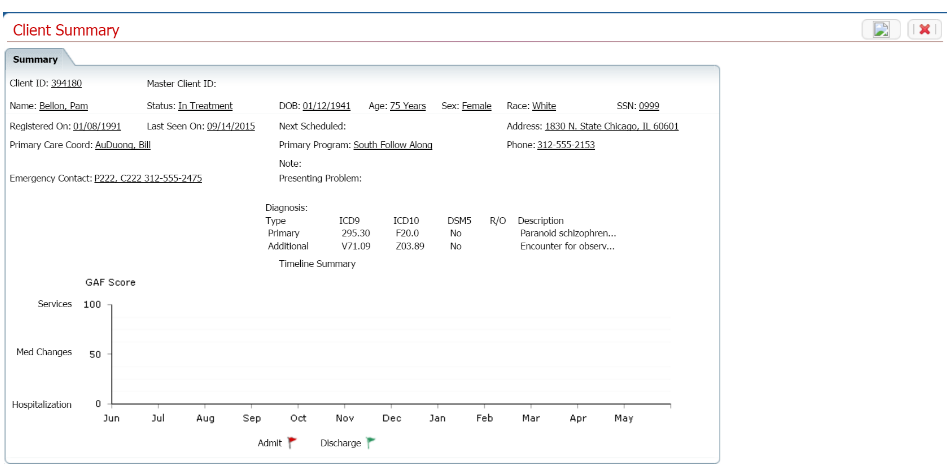
The *Client Search* window is displayed. View field definitions.



2. Search for the client you want. Tell me how...

3. When the client you want is displayed and selected, click the **Select** button.

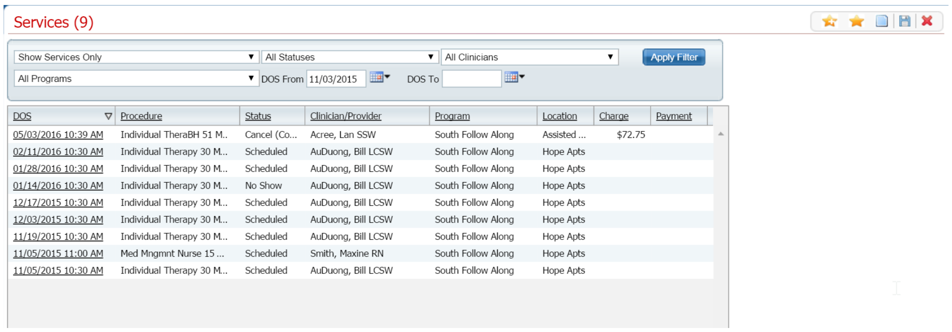
The *Client Summary* page is displayed. View field definitions.



4. Notice that a *Client* tab is displayed to the right of the *My Office* tab. The tab displays the client's last name, first name and the client ID in parentheses.

5. Select **Services** from the *Client* banners.

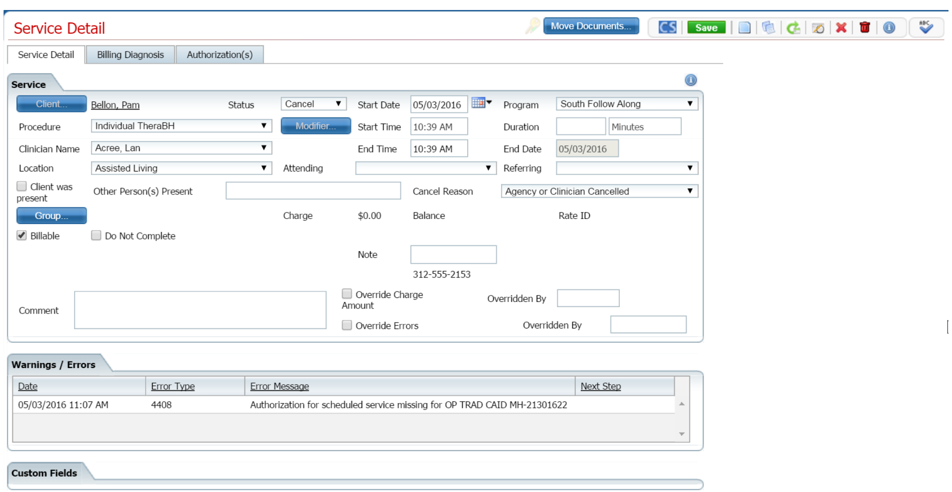
   The *Services (#)* window is displayed. View field definitions.



6. Filter the list to determine the records that are displayed. Tell me how...

7. To change an existing service, click on the **date of service** in the *DOS* column.

   The *Service Detail* page is displayed with the *Service Detail* tab active.

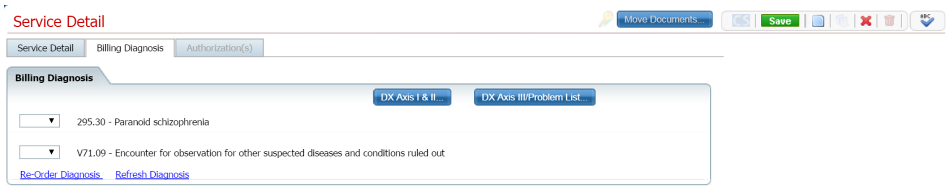


8. Make changes on the **Service Detail** tab for this service, if needed. View field definitions.

9. Click the **Save** button.

10. Click on the **Billing Diagnosis** tab to make it active.

    The *Billing Diagnosis* tab is displayed.



11. Make changes on the **Billing Diagnosis** tab for this service, if needed. View field definitions.

12. Click on the **Save** button.

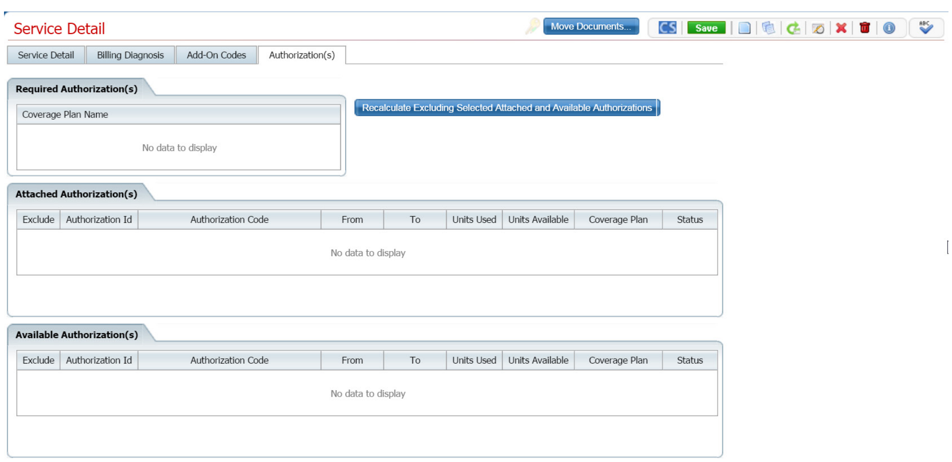
13. If the *Add-On Codes* tab is present, click the **Add-On Codes** tab to make it active.

    The *Add-On Codes* tab is displayed.

14. Make changes on the **Add-On Codes** tab, if needed. Tell me how... View field definitions.

15. Click the **Authorization(s)** tab to make it active.

    The *Authorization(s)* tab is displayed.



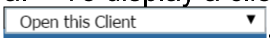
16. Make changes on the **Authorization(s)** tab, if needed. View field definitions.

17. Click the **Save** button.

18. When you are done making changes, click the **Exit** icon to return to the *Services* list page.

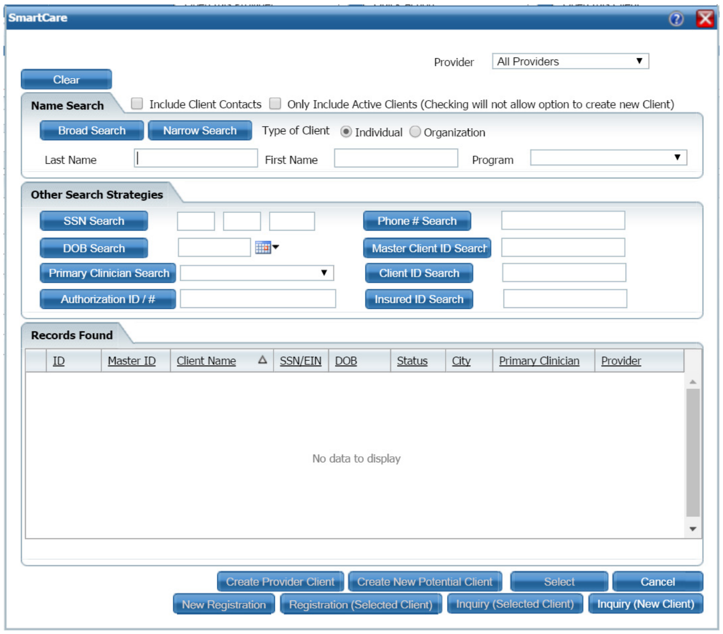
To Delete a Service

You **cannot** delete a service that shows a status of *Complete*. Take care when deleting a service as deleting records can cause problems throughout the system and on billing procedures.

1. Display the client you want to work with.
    a. To display a client, click the **Open this Client** drop down list .

    b. Select the **<Client Search>** option.

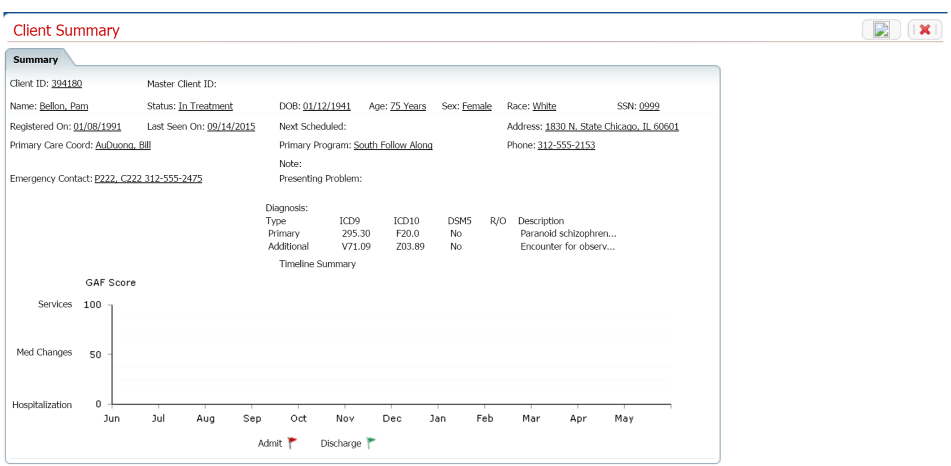
The *Client Search* window is displayed. View field definitions.



2. Search for the client you want. Tell me how...

3. When the client you want is displayed and selected, click the **Select** button.

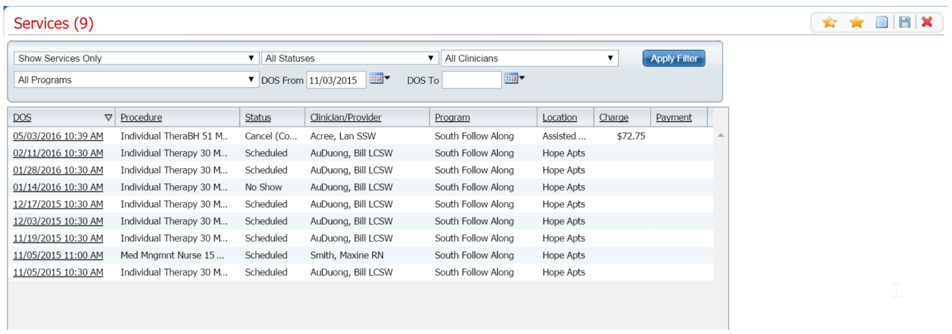
The *Client Summary* page is displayed. View field definitions.



4. Notice that a *Client* tab is displayed to the right of the *My Office* tab. The tab displays the client's last name, first name and the client ID in parentheses.

5. Select **Services** from the *Client* banners.

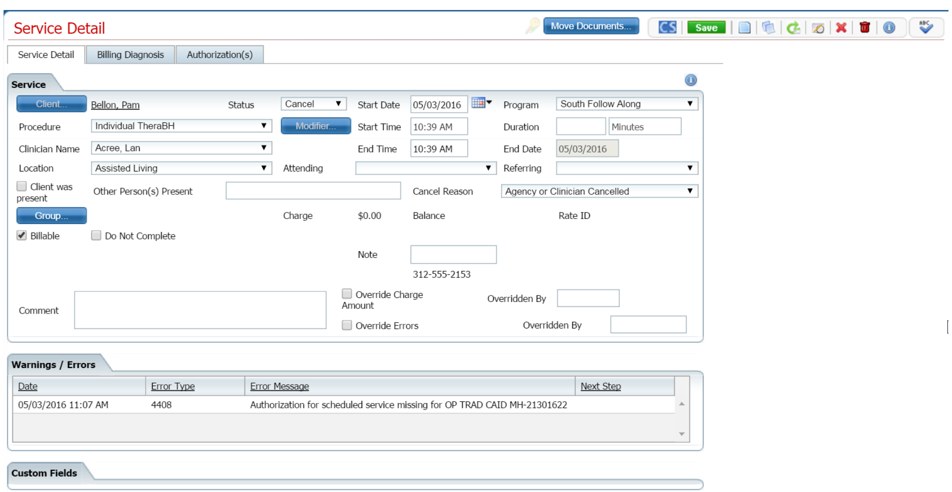
   The *Services (#)* window is displayed. View field definitions.



6. Filter the list to determine the records that are displayed. Tell me how...

7. To delete a service, click on the **date of service** in the *DOS* column.

   The *Service Detail* page is displayed with the *Service Detail* tab active.



8. Click the **trash can**  icon in the task bar.

9. Click the **Yes** button in the *Confirmation Message* window.

10. Click the **Exit** icon  to return to the *Services* list page.

[Why can't I access these screens?]

Add a Group to a Client's Service

1. With the *Service Detail* tab displayed with the client's data appearing, click on the **Group** button. Tell me how to display the *Service Detail* tab.

   The *Select Group* window is displayed.

2. Select the **Group** you want to add to the client's service.

3. Click the **Save** button.

4. Click the **Exit** button to close the window and return to the client's *Service Detail* page.

Why can't I access these screens?

Copy Service

Use this feature on the *Service Detail* page for a client with an existing service. The *Copy Service* icon lets you make a copy of the service that is displayed, and then allows you to make changes to the service, if needed. This is an efficient process if the majority of the existing service details are the same for the copy of the service you make.

From the same client or to a different client???

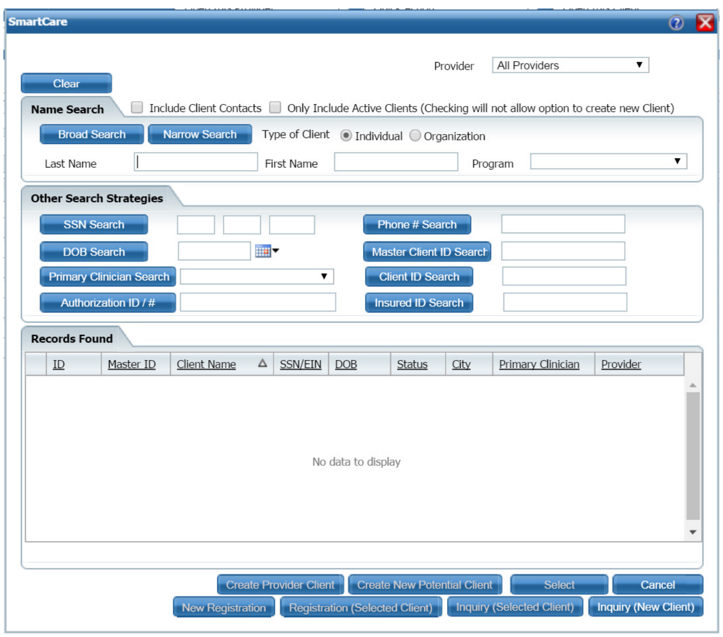
To Copy a Client's Service

1. Display the client you want to work with.

a. To display a client, click the **Open this Client** drop down list Open this Client.

b. Select the **<Client Search>** option.

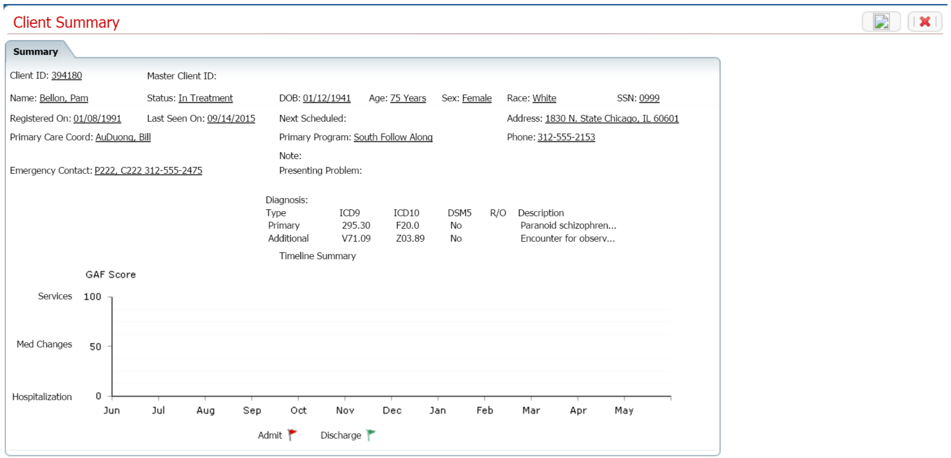
The *Client Search* window is displayed. View field definitions.



2. Search for the client you want. Tell me how...

3. When the client you want is displayed and selected, click the **Select** button.

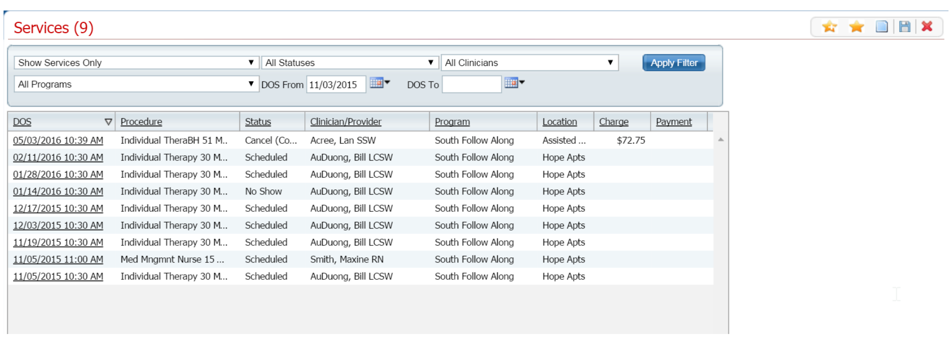
The *Client Summary* page is displayed. View field definitions.



4. Notice that a *Client* tab is displayed to the right of the *My Office* tab. The tab displays the client's last name, first name and the client ID in parentheses.

5. Select **Services** from the *Client* banners.

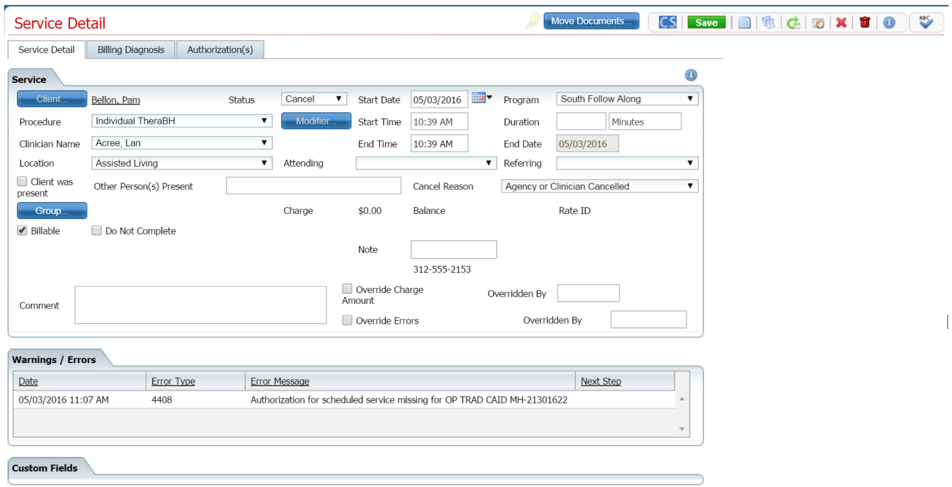
The *Services (#)* window is displayed. View field definitions.



6. Filter the list to determine the records that are displayed. Tell me how...

7. To make a copy of an existing service, click on the **date of service** you want in the *DOS* column.

The *Service Detail* page is displayed with the *Service Detail* tab active.



8. Verify this is the service you want to copy.

9. Click the **Save** button.

10. Click the **Copy Service**  icon in the task bar.

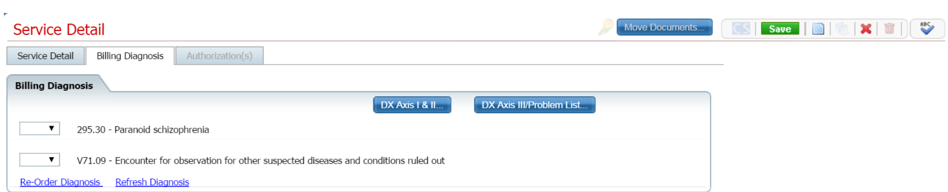
    A copy of the *Service Detail* page is displayed. Notice that the *date of service* is changed to the current day's date and the status is changed to *Scheduled*.

11. Make changes on the **Service Detail** tab for this service, if needed. View field definitions.

12. Click the **Save** button.

13. Click on the **Billing Diagnosis** tab to make it active.

    The *Billing Diagnosis* tab is displayed.



14. Make changes on the **Billing Diagnosis** tab for this service, if needed. View field definitions.

15. Click on the **Save** button.

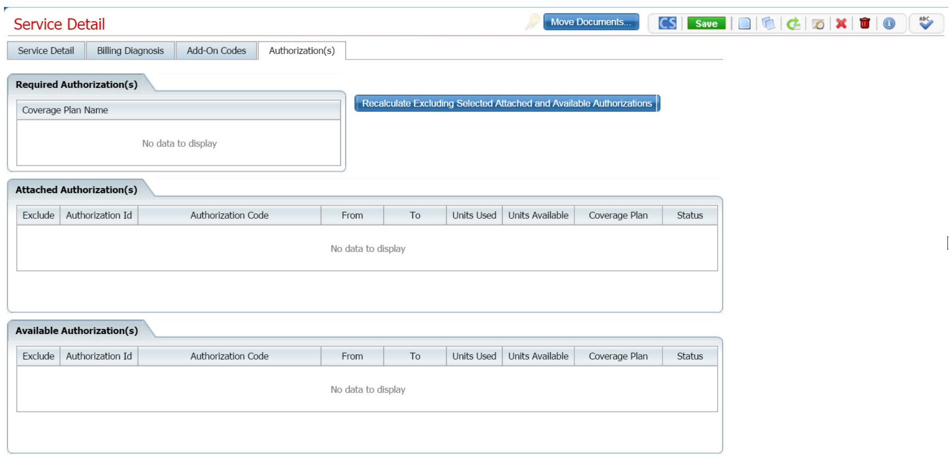
16. If the *Add-On Codes* tab is present, click the **Add-On Codes** tab to make it active.

17. The *Add-On Codes* tab is displayed.

18. Make changes on the *Add-On Codes* tab, if needed. Tell me how... View field definitions.

19. Click the **Authorization(s)** tab to make it active.

   The *Authorization(s)* tab is displayed.



20. Make changes on the **Authorization(s)** tab, if needed. View field definitions.

21. Click the **Save** button.

22. When you are done making changes, click the **Exit** icon to return to the *Services* list page.

Why can't I access these screens?

Move Documents between Dates of Service

From the client's *Service Detail* page, you can move documents. To move documents, means to move a document(s) from one of the client's service to another service of that client's. Same client??? When you move a document, the service you move the document from no longer has a document attached to the service. The service date you moved the document from now has a status of *Error*. The document is now attached to the service you moved it to.

You choose the dates of service that you are moving the document from and to. The date of service currently displayed on the *Service Detail* page does not affect the move action.

To Move Documents between Dates of Service

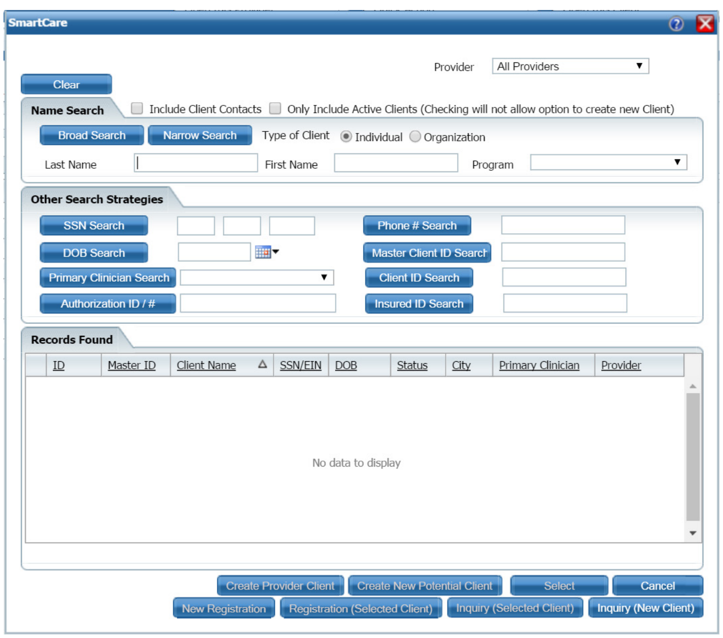
1. Display the client you want to work with.

a. To display a client, click the **Open this Client** drop down list 

.

b. Select the **<Client Search>** option.

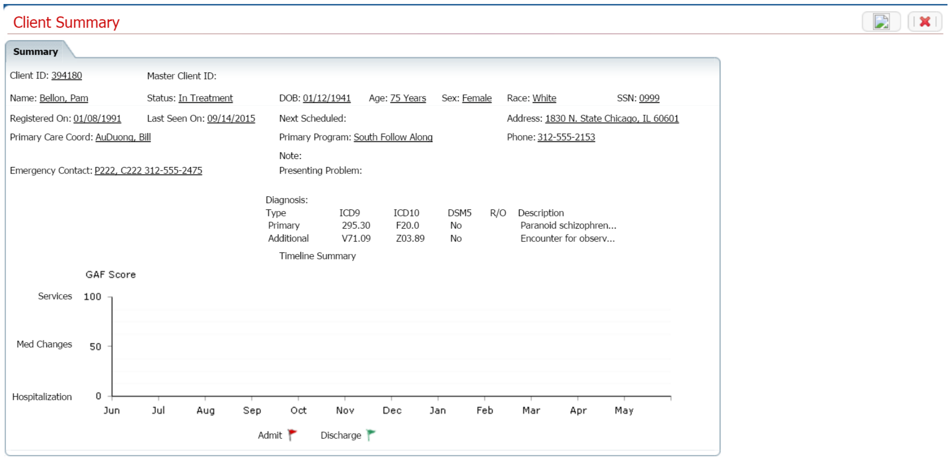
The *Client Search* window is displayed. View field definitions.



2. Search for the client you want move documents for. Tell me how...

3. When the client you want is displayed and selected, click the **Select** button.

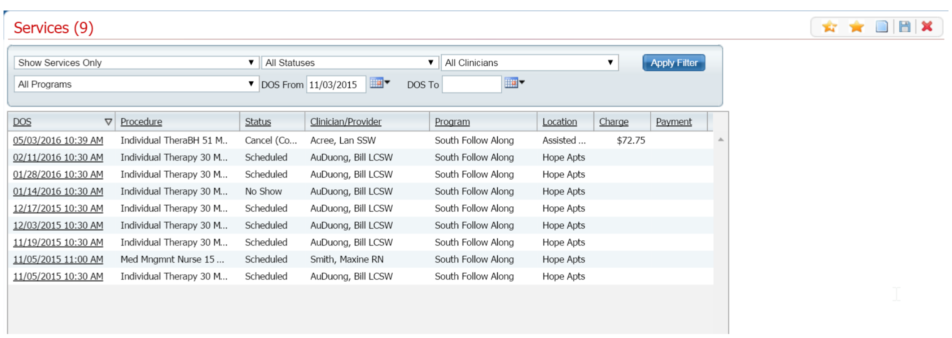
The *Client Summary* page is displayed. View field definitions.



4. Notice that a *Client* tab is displayed to the right of the *My Office* tab. The tab displays the client's last name, first name and the client ID in parentheses. Notice that the client tab is dark blue. This indicates that the banners that are displayed are specific to client activities you can perform.

5. Select **Services** from the *Client* banners.

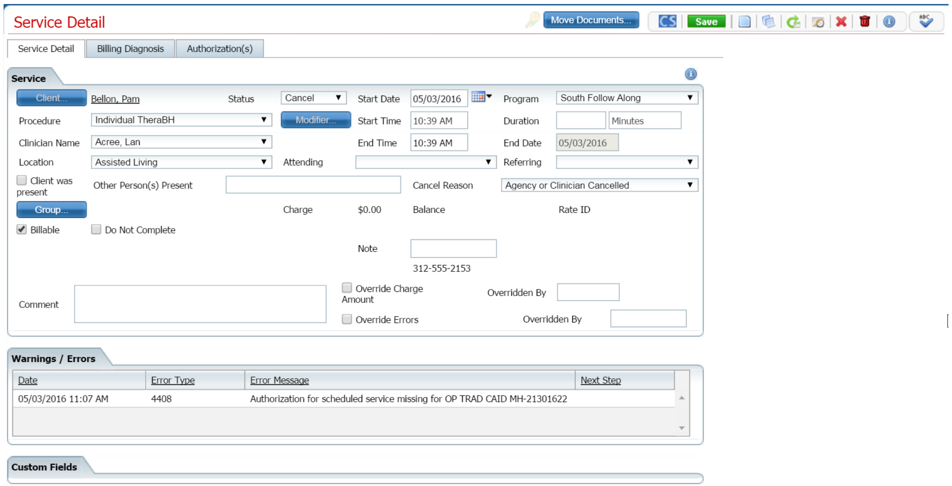
   The *Services (#)* window is displayed. View field definitions.



6. Filter the list to determine the records that are displayed. Tell me how...

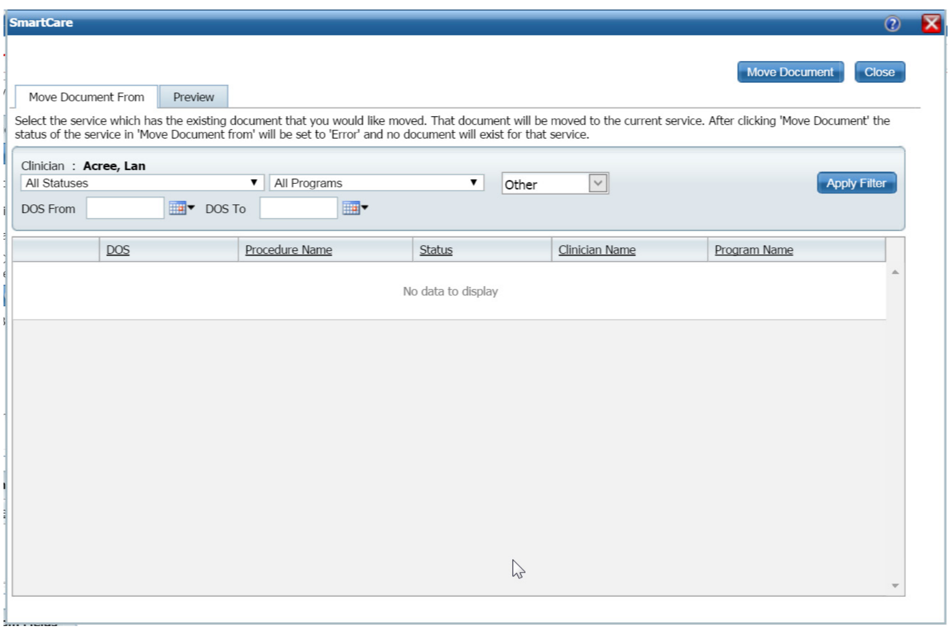
7. Click on the **hyperlinked date of service** in the *DOS* column.

   The *Service Detail* page is displayed with the *Service Detail* tab active.



8. Click on the **Move Documents** button  in the task bar.

   The *Move Documents* window is displayed.



9. Filter the list to determine the records that are displayed. Tell me how...

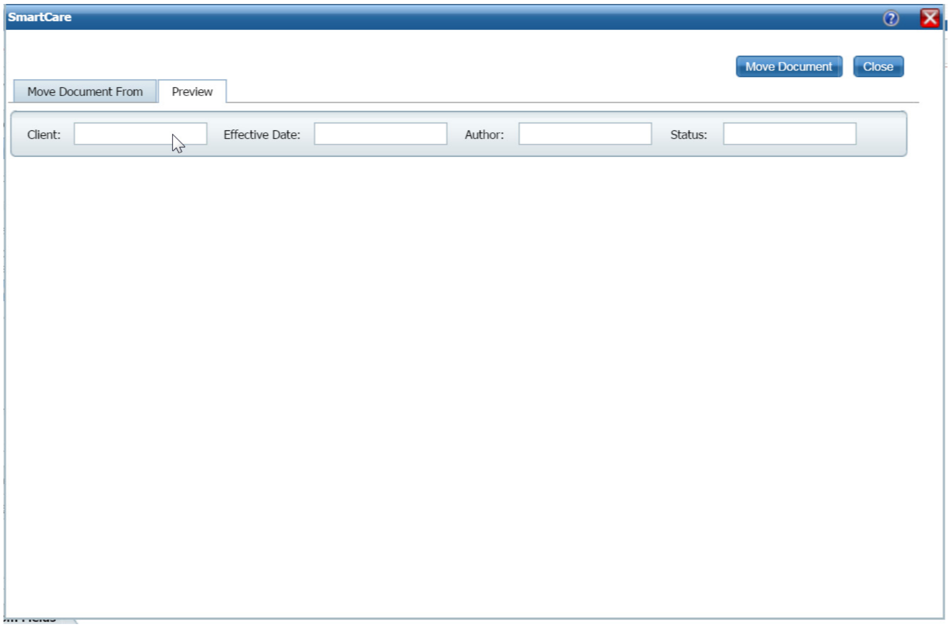
10. Click the **Apply Filter** button.

    The records that match your search filters are displayed.

11. Find the document that you want to move.

12. Click on the **hyperlinked date of service** in the *DOS* column to view the details of the document.

13. Click on the **Preview** tab to view the details of the document. True???



14. When you are ready to move the document, click the **Move Document** button on the *Move Document* window.

15. Click the **Close** button to close the window.

    The *Service Detail* page is displayed.

Why can't I access these screens?

Print a Clinical Summary

You print a clinical summary for a client at the end of a service. If the patient declines the summary, you click the *Client Declined* button which ensures the effort to produce the summary is added to *Meaningful Use* statistics.

To Print the Clinical Summary

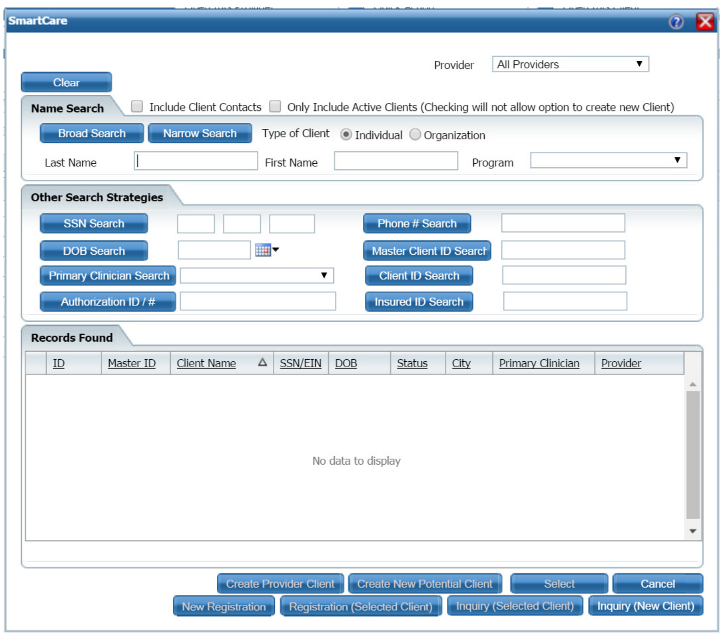
1. Display the client you want to work with.

a. To display a client, click the **Open this Client** drop down list 

.

b. Select the **<Client Search>** option.

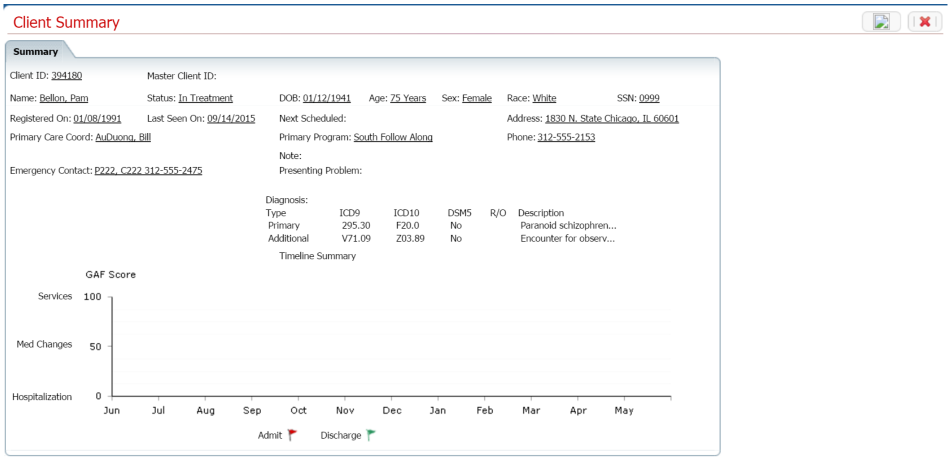
The *Client Search* window is displayed. View field definitions.



2. Search for the client you want to print a clinical summary for. Tell me how...

3. When the client you want is displayed and selected, click the **Select** button.

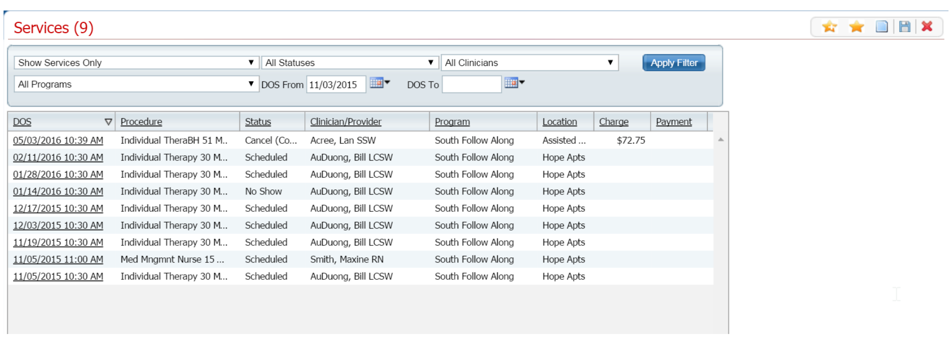
The *Client Summary* page is displayed. View field definitions.



4. Notice that a *Client* tab is displayed to the right of the *My Office* tab. The tab displays the client's last name, first name and the client ID in parentheses. Notice that the client tab is dark blue. This indicates that the banners that are displayed are specific to client activities you can perform.

5. Select **Services** from the *Client* banners.

The *Services (#)* window is displayed. View field definitions.

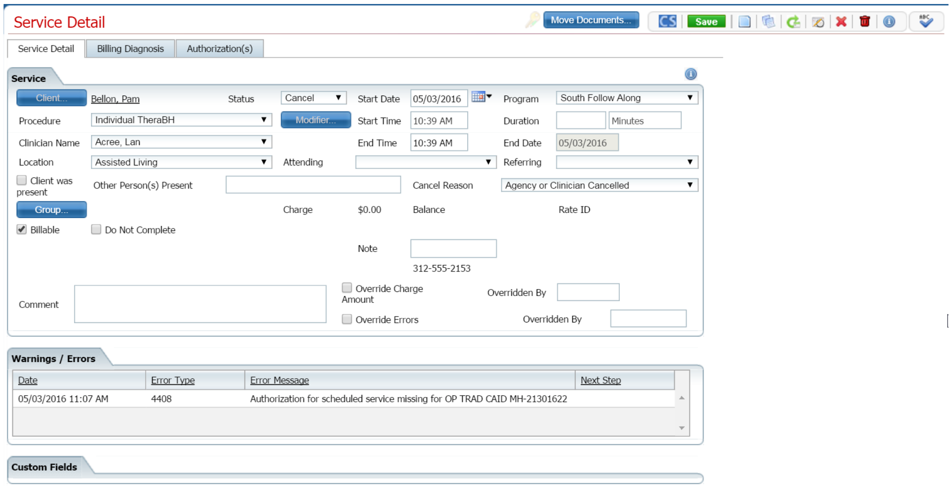


DOS	Procedure	Status	Clinician/Provider	Program	Location	Charge	Payment
05/03/2016 10:39 AM	Individual TheraBH 51 M..	Cancel (Co...	Acree, Lan SSW	South Follow Along	Assisted ...	$72.75	
02/11/2016 10:30 AM	Individual Therapy 30 M..	Scheduled	AuDuong, Bill LCSW	South Follow Along	Hope Apts		
01/28/2016 10:30 AM	Individual Therapy 30 M..	Scheduled	AuDuong, Bill LCSW	South Follow Along	Hope Apts		
01/14/2016 10:30 AM	Individual Therapy 30 M..	No Show	AuDuong, Bill LCSW	South Follow Along	Hope Apts		
12/17/2015 10:30 AM	Individual Therapy 30 M..	Scheduled	AuDuong, Bill LCSW	South Follow Along	Hope Apts		
12/03/2015 10:30 AM	Individual Therapy 30 M..	Scheduled	AuDuong, Bill LCSW	South Follow Along	Hope Apts		
11/19/2015 10:30 AM	Individual Therapy 30 M..	Scheduled	AuDuong, Bill LCSW	South Follow Along	Hope Apts		
11/05/2015 11:00 AM	Med Mngmnt Nurse 15 ...	Scheduled	Smith, Maxine RN	South Follow Along	Hope Apts		
11/05/2015 10:30 AM	Individual Therapy 30 M..	Scheduled	AuDuong, Bill LCSW	South Follow Along	Hope Apts		

6. Filter the list to determine the records that are displayed. Tell me how...

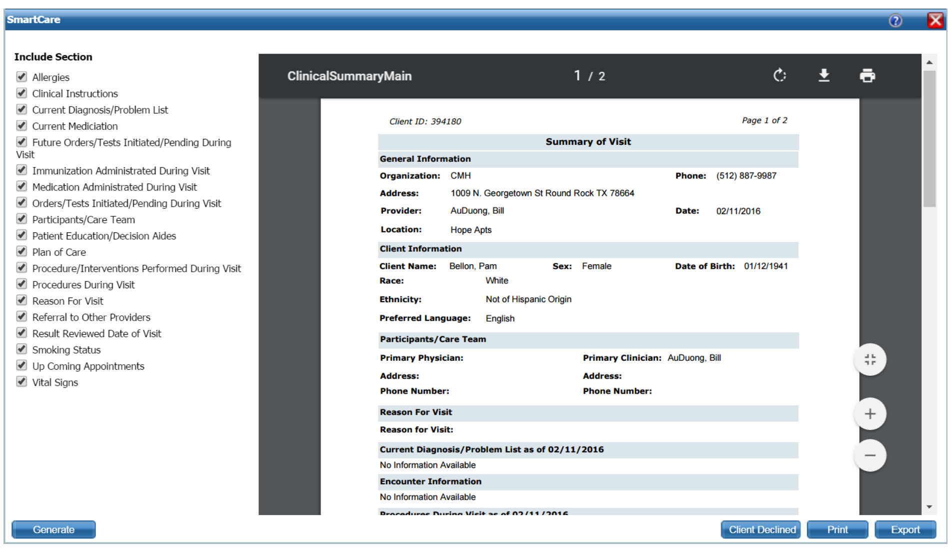
7. Click on the **hyperlinked date of service** in the *DOS* column.

The *Service Detail* page is displayed with the *Service Detail* tab active. View [field definitions](#).



8. Click the print the **clinical summary** icon  in the task bar.

   The *Clinical Summary* window is displayed. Tell me how to [View the Clinical Summary Document.]()



9. Notice in the *Include Section*, that all components of the clinical summary are listed and selected. If an option is selected, the information appears on the printed *Summary*.

10. To avoid including a component on the printed *Clinical Summary*, deselect the components you do not want included and click the **Generate** button to re-display the *Summary* with those components removed.

11. To print the *Summary*, click the **Print** button. Nothing happened. However, the print icon in the window does display a print dialogue window.

12. If the client declines a copy of the printed *Summary*, click the **Client Declined** button. Although you do not print a *Summary* for the client, the activity is counted in *Meaningful Use* statistics when you click the **Client Declined** button.

13. You can export the *Clinical Summary* to an .xml format file. To do this, click the **Export** button. The exported file is displayed in the download bar at the bottom of your screen.

14. Click on the **download document** icon to open the document.

When you click on the *download document* icon, the *Print Summary* window is closed and the *Service Detail* page is displayed.

10. When you are finished working with the *Clinical Summary*, click the **Exit** button in the top right corner of the window.

[Why can't I access these screens?]

Reschedule a Service for a Client

Any status required to reschedule a service? Cannot reschedule a service that has a status of Show?

The procedure for re-scheduling a service for a client is different depending on the type of service you are rescheduling.

Reschedule a Group Service

Reschedule an Individual Service for a Client

Reschedule a Group Service

There are two ways you can reschedule a group service. You can:

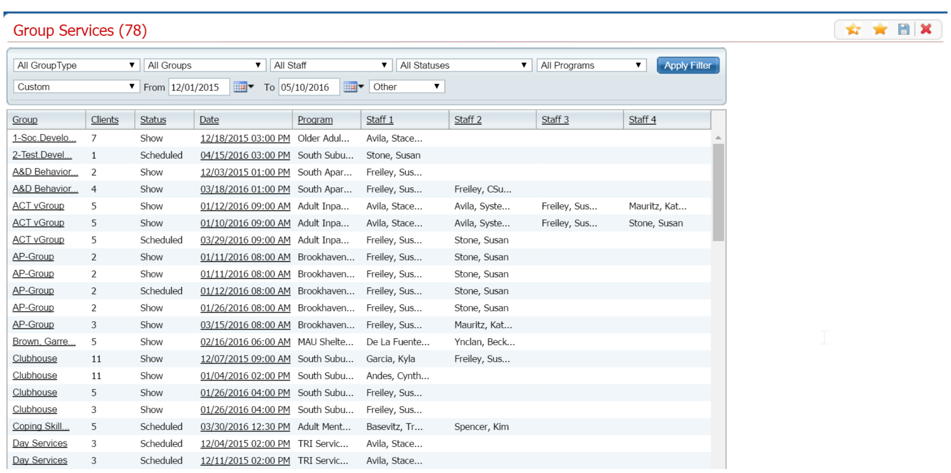
- Access the group service date of service
- Access a member of the group service you want to reschedule

Access the Group Service to Reschedule

You can only reschedule a group service with a status of *Scheduled*.

1. Follow this path: **My Office > Groups/Day Services/Group Services**.

   The *Group Services (##)* list page is displayed. View field definitions.



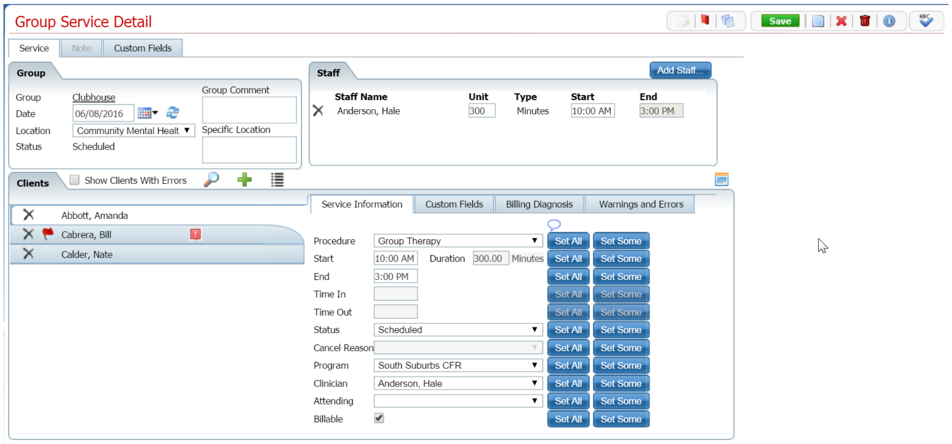
Group	Clients	Status	Date	Program	Staff 1	Staff 2	Staff 3	Staff 4
1-Soc.Develo...	7	Show	12/18/2015 03:00 PM	Older Adul...	Avila, Stace...			
2-Test.Devel...	1	Scheduled	04/15/2016 03:00 PM	South Subu...	Stone, Susan			
A&D Behavior...	2	Show	12/03/2015 01:00 PM	South Apar...	Freiley, Sus...			
A&D Behavior...	4	Show	03/18/2016 01:00 PM	South Apar...	Freiley, Sus...	Freiley, CSu...		
ACT vGroup	5	Show	01/12/2016 09:00 AM	Adult Inpa...	Avila, Stace...	Avila, Syste...	Freiley, Sus...	Mauritz, Kat...
ACT vGroup	5	Show	01/10/2016 09:00 AM	Adult Inpa...	Avila, Stace...	Avila, Syste...	Freiley, Sus...	Stone, Susan
ACT vGroup	5	Scheduled	03/29/2016 09:00 AM	Adult Inpa...	Freiley, Sus...	Stone, Susan		
AP-Group	2	Show	01/11/2016 08:00 AM	Brookhaven...	Freiley, Sus...	Stone, Susan		
AP-Group	2	Show	01/11/2016 08:00 AM	Brookhaven...	Freiley, Sus...	Stone, Susan		
AP-Group	2	Scheduled	01/12/2016 08:00 AM	Brookhaven...	Freiley, Sus...	Stone, Susan		
AP-Group	2	Show	01/26/2016 08:00 AM	Brookhaven...	Freiley, Sus...	Stone, Susan		
AP-Group	3	Show	03/15/2016 08:00 AM	Brookhaven...	Freiley, Sus...	Mauritz, Kat...		
Brown, Garre...	5	Show	02/16/2016 06:00 AM	MAU Shelte...	De La Fuente...	Ynclan, Beck...		
Clubhouse	11	Show	12/07/2015 09:00 AM	South Subu...	Garcia, Kyla	Freiley, Sus...		
Clubhouse	11	Show	01/04/2016 02:00 PM	South Subu...	Andes, Cynth...			
Clubhouse	5	Show	01/26/2016 04:00 PM	South Subu...	Freiley, Sus...			
Clubhouse	3	Show	01/26/2016 04:00 PM	South Subu...	Freiley, Sus...			
Coping Skill...	5	Scheduled	03/30/2016 12:30 PM	Adult Ment...	Basevitz, Tr...	Spencer, Kim		
Day Services	3	Scheduled	12/04/2015 02:00 PM	TRI Servic...	Avila, Stace...			
Day Services	3	Scheduled	12/11/2015 02:00 PM	TRI Servic...	Avila, Stace...			

2. Filter the list to determine the records that are displayed. Tell me how...

3. Find the group and date of service that you want to reschedule.

4. Click on the date of service in the Date column that you want to reschedule.

   The *Group Service Detail* page is displayed. View field definitions.



5. Click on the **calendar** icon next to the *Date* field to select a new date.

   The calendar icon drop down is displayed.

6. Click on a **new date** to reschedule the group service.

   The date is changed in the *Date* field on the *Group* section of the Group Service Detail page Service tab.

7. Make other changes to the scheduled group service, if needed.

8. Click the **Save** button in the task bar.

9. Click the **Exit** icon in the task bar.

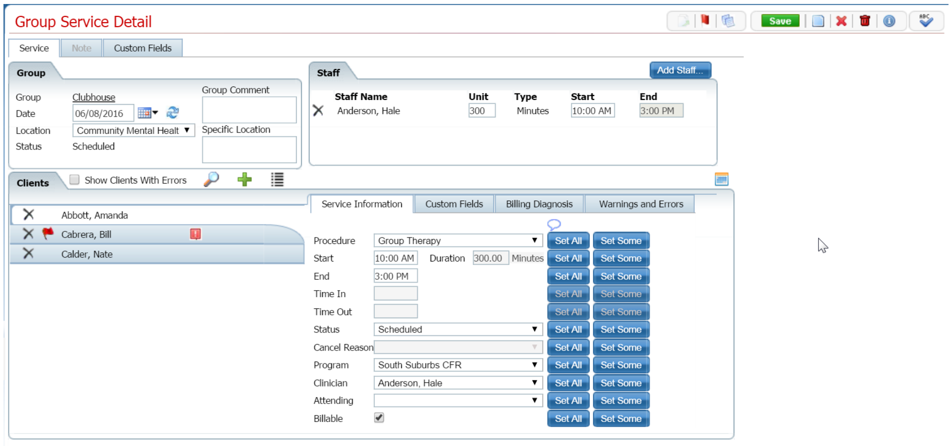
   The *Group Services (###)* list page is displayed.

Access a Member of the Group Service to Reschedule

1. Display the *Service Detail* tab with the client's data appearing for the date of service you want to reschedule. Tell me how to display the *Service Detail* tab.

2. Click the **Reschedule Service** icon in the task bar.

3. If the client is a member of a group and you selected a service that is a group service, the *Group Service Detail* page is displayed for the group service. View field definitions.



4. Click on the **calendar**  icon next to the *Date* field to select a new date.

The calendar icon drop down is displayed.

5. Click on a **new date** to reschedule the group service.

The date is changed in the *Date* field on the *Group* section of the Group Service Detail page Service tab.

6. Make other changes to the scheduled group service, if needed.

7. Click the **Save** button in the task bar.

8. Click the **Exit**  icon in the task bar.

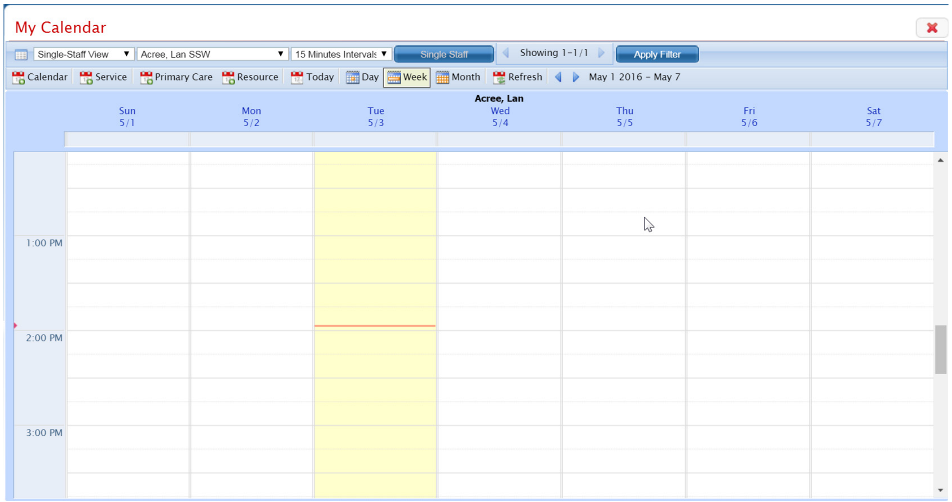
The *Service Detail* page is displayed.

Reschedule Individual Service for a Client

1. Display the *Service Detail* tab with the client's information appearing for the date of service you want to reschedule. Tell me how to display the *Service Detail* tab.

2. Click the **Reschedule Service**  icon in the task bar.

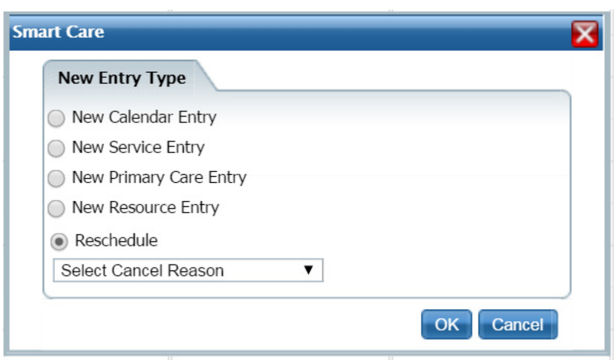
The *My Calendar* page is displayed. The calendar for the staff member who was assigned to the service where you clicked on the *Reschedule Service* icon is displayed. View field definitions.



3. Find a date and time when you want to reschedule the client's service.

4. Click in the date and time space on the calendar.

   The *New Entry Type* window is displayed.

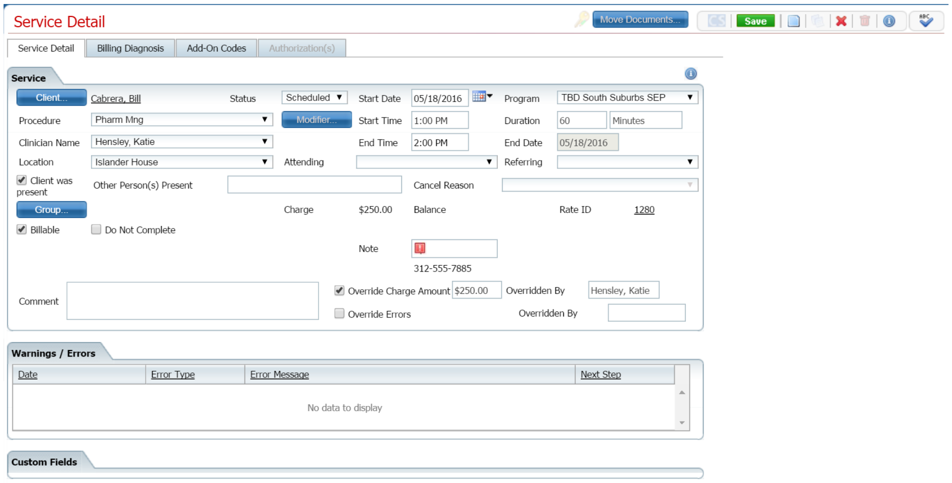


5. Select the **Reschedule** option.

6. Select a **Cancel Reason** from the drop down list.

7. Click the **OK** button.

   The *Service Detail* page is displayed with the service information from the service you are rescheduling showing with the new date and time you indicated on the calendar. View [field definitions](#).



8. Change information on the rescheduled service, if needed.

9. Click the **Save** button.

10. Click the **Exit**  icon in the task bar.

    The *My Calendar* page is displayed with the original date information displayed. The service you rescheduled has been moved.

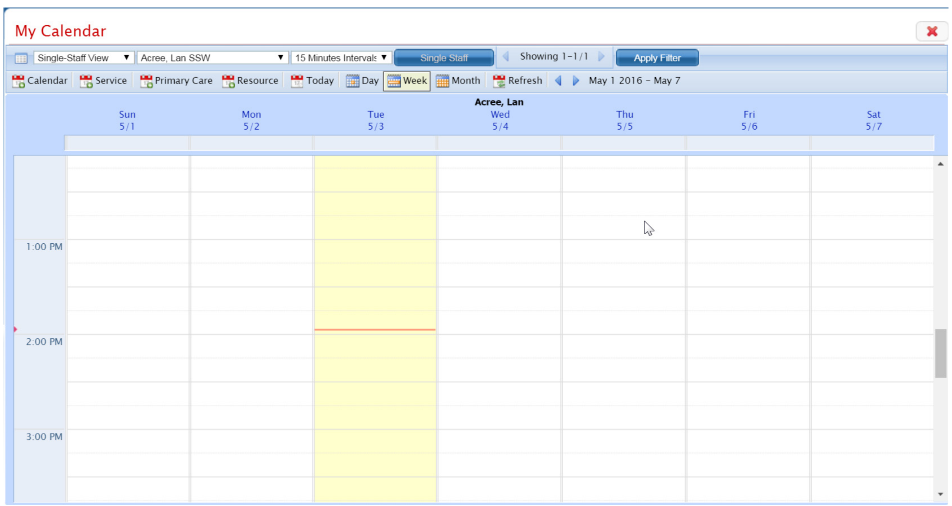
11. Click the **Exit**  icon to close the My Calendar page(s).

    The *Service Detail* page is displayed.

[Why can't I access these screens?]

Schedule a Follow-up with a Client

When you click the **Schedule Follow-Up**  icon on the *Service Detail* page for a specific client, the *My Calendar* page is displayed with the assigned staff member from the service record that was displayed selected.



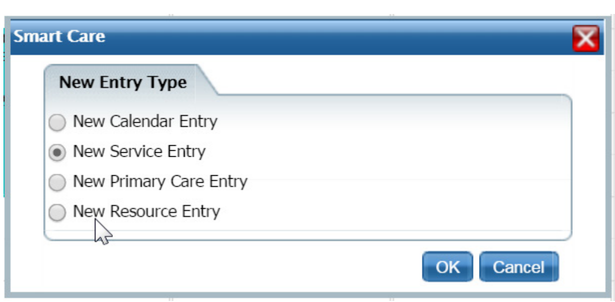
1. Find the **date and time** when you want to schedule a follow-up visit. Tell me how... View field definitions.

2. Change the **intervals** you view on the calendar, if desired. Tell me how...

3. Change the **view** of the calendar, if needed. Tell me how...

4. Click in the **time slot** on the day when you want to schedule the follow-up visit.

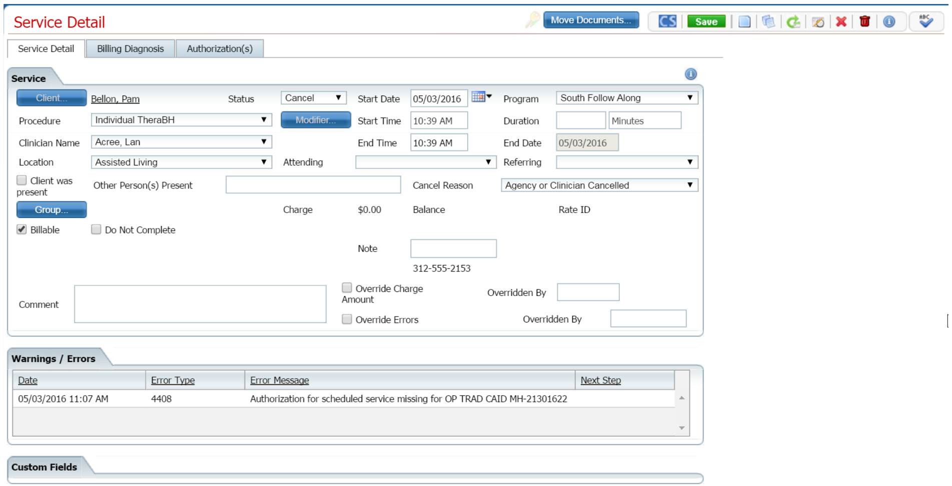
   The *New Entry Type* window is displayed. View field definitions.



5. Select the **New Service Entry** option to schedule a follow-up visit.

6. Click the **OK** button.

The *Service Detail* page for the follow-up visit is displayed with the date and time you selected on the calendar.



7. Make **changes** on the *Service Detail* page, if needed. Tell me how...

8. When the follow-up visit is complete, click the **Save** button in the task bar.

   The icons in the task bar are activated and you can complete other procedures for this client related to services.

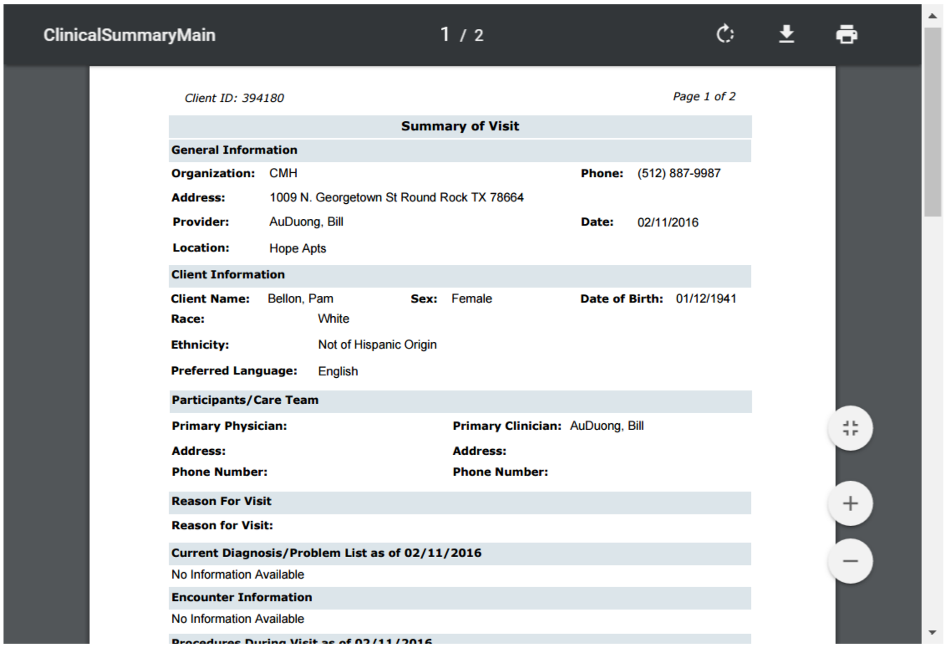
9. Click the **Exit** icon in the task bar to return to the *Services* list page.

Why can't I access these screens?

View the Clinical Summary Document before Printing

1. With the *Print Clinical Summary* window displayed, move the cursor over the document image.

   These icons appear on the image. Refer to the icon definitions table below the image for a definition of each icon.



Icon Definitions

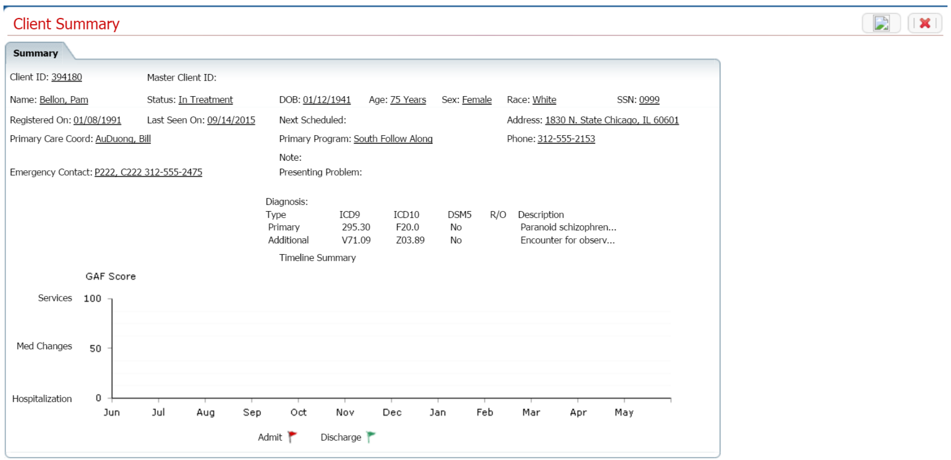
Field	Required?	Description
When you hover your cursor over the *Clinical Summary* image, these icons are displayed.		
1 / 2 Page numbers		The number to the right of the slash / indicates the number of pages in the summary document. The number to the left of the slash identifies the number of the page that is displayed. Use the **PgDn** button on your keyboard or the scroll bar in the image to move to a different page.
Rotate clockwise		Click this icon to rotate the image of the summary document clockwise on quarter turn. To return to the original display, you can keep clicking the icon to continue rotating the document clockwise a quarter turn.
Download document		Click the icon to download a copy of the summary document to the local drive on your computer.
Print document		Click this icon to print the document.

 Fit the document to page size		Click this icon to increase the size of the document to page-size.
 Zoom in to magnify the view of the document		Click this icon to zoom in to magnify the view of the document.
 Zoom out to decrease the view of the document.		Click this icon to zoom out to decrease the view of the document.

Return to the *Print Clinical Summary* topic.

Field Definitions

Client Summary Page Field Definitions

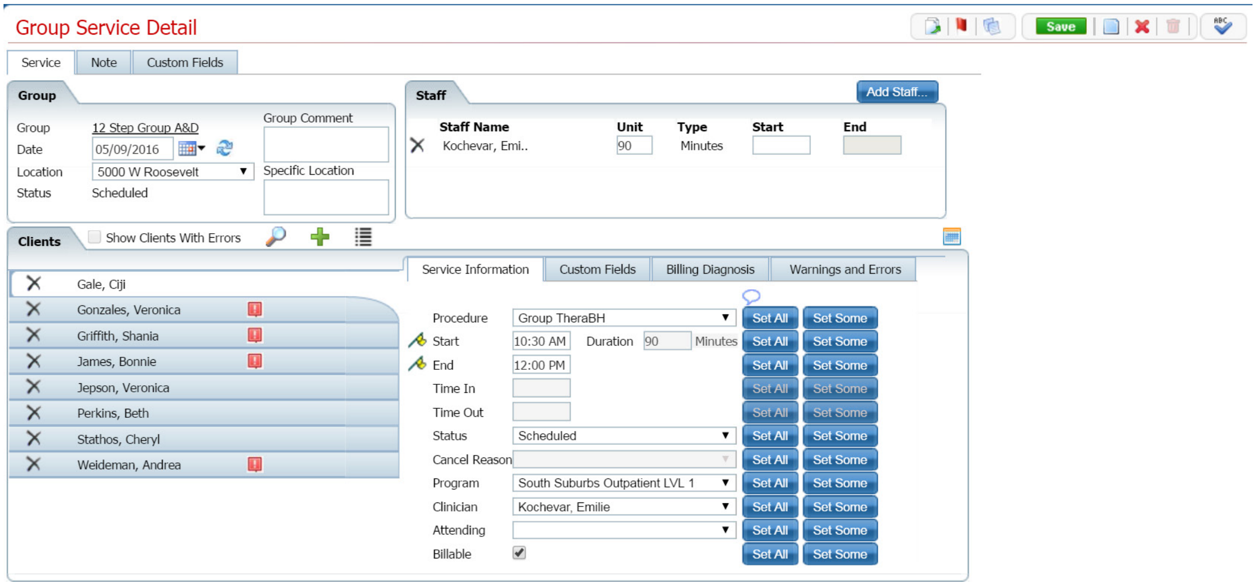


A **Yes** in the *Required?* column below identifies those fields that are required in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	**Required?**	**Description**
Summary		
Client ID		Identifies the system-assigned number created for the client when first registered.
Master Client ID		What is this???
Name		Identifies the client's last name, first name.
Status		Identifies the client's current status. Statuses are:
DOB		Identifies the client's date of birth.
Age		Identifies the client's age.
Sex		Identifies the client's sex.
Race		Identifies the client's race.
SSN		Identifies the last four digits of the client's social security number.
Registered On		Identifies the date when the client was registered in the system.
Last Seen On		Identifies the last date the client was seen in the facility.
Next Scheduled		Identifies the next scheduled visit for the client.
Address		Identifies the client's address.
Primary Care Coord		Identifies the client's assigned primary care coordinator.
Primary Program		Identifies the primary program that the client is enrolled in.
Phone		Identifies the client's phone number.
Note		Identifies any note entered where??? for the client.

Emergency Contact		Identifies the client's emergency information and phone number.
Presenting Problem		Identifies the client's presenting problem for this visit.
Diagnosis		Identifies the diagnoses assigned to the client for this visit. The information is arranged in a table.
Type		Notice that the Types set up columns for the diagnosis code information table. Headings are: • ICD9 • ICD10 • DSM5 • R/O (rule out) • Description
Primary		This row identifies the primary diagnosis for the client. Entries may be listed in each column.
Additional		This row identifies any additional diagnoses for the client. Entries may be listed in each column.
Timeline Summary		
GAF Score		Identifies the GAF (Global Assessment of Functioning) score for the client on the graph.
Y-axis		The items on the Y-axis are: • Hospitalization 0 • Med Changes 50 • Services 100
X-axis		The items on the X-axis are the months of the year.
Flags		The red flag identifies an admission; the green flag identifies a discharge.

Group Service Detail Page Service Tab Field Definitions



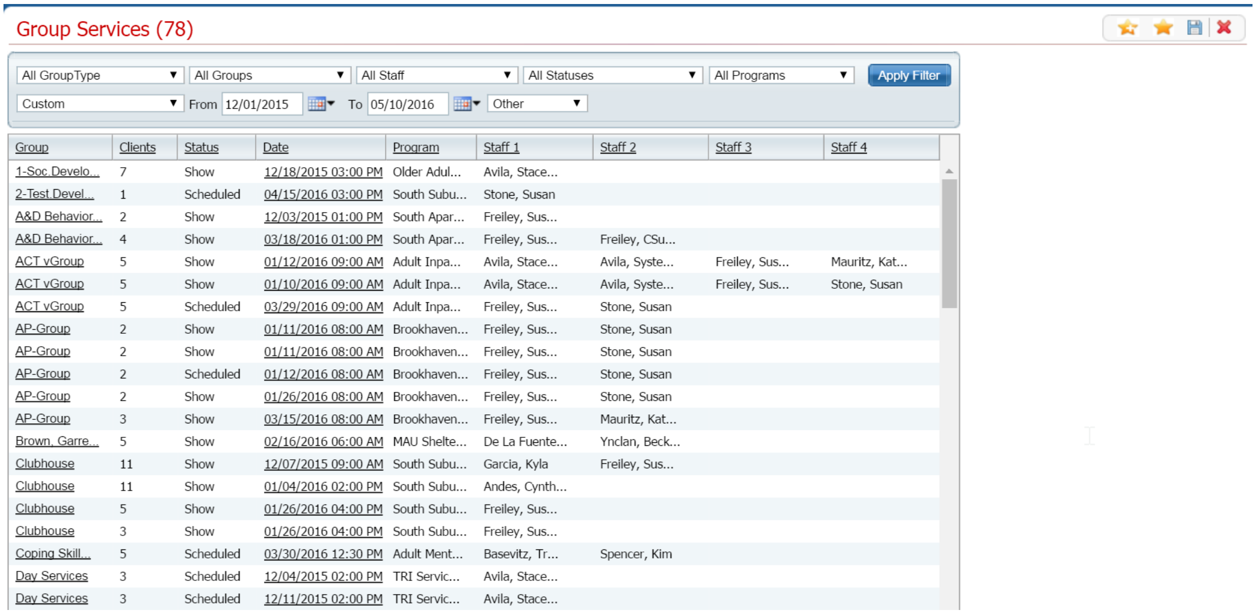
A **Yes** in the *Required?* column below identifies those fields that are required in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Required?	Description
Group		
Group		Identifies the group name assigned to the group when the group was first set up.
Date		Identifies the first date the group service meets. Defined when the group service was set up.
Make Recurring icon		To make a group service recurring for a new group service, complete the *Service* tab, including the *Service Information* sub-tab for each client, then click the **Make Recurring** icon. Tell me how...
Location		Identifies the location set up for the group.
Status		Identifies the status of the group service. When the group service is first set up, the status shows as *Scheduled*. When the service has occurred and the clients have been checked in, the status appears as *Show*.
Group Comment		Enter a comment about the group. You can enter unlimited characters. A scroll bar is provided if you enter more characters than can be viewed in the window.
Specific Location		Enter specific information t identify the location of the group meeting. You can enter unlimited characters. A scroll bar is provided if you enter more characters than can be viewed in the window.
Clients		
Show Clients With Errors		Click to display only clients with errors in the list. Grayed out.

Search for Client icon		Click the **magnifying glass** icon to display the *Client Search* window to search for a client to add to the group. Tell me how...
Add Client from Roster icon		Click the **green plus sign** icon to select a client from the list of clients set up in the group. Tell me how...
Add Client from Program icon		Click the **list** icon to select a client from a list of all clients enrolled in the program assigned to the group when it was set up. Tell me how...
Scroll list icon		If the list of clients enrolled in the group is longer than can be displayed in the *Clients* list window, this icon is displayed. Click the **left arrow** to display from the top of the list. Click the **right arrow** to scroll down in the list.
Show Service Report icon		Click the **show service report** icon to display the service report for the group service. View field definitions.
X		Click the X icon to the left of a client's name to delete the client from the list of clients enrolled in the group service.
Client name		Identifies the client's last name, first name who is enrolled in the group service.
Information icon		The information icon next to a client's name indicates there is information about the client that needs attention in the system. Hover your mouse cursor over the icon and an information pop-up box is displayed that contains the information.
Service Information tab		
Select a client's name		When you click on a client's name in the list of clients, the information displayed to the right in the four tabs is specific to the selected client. This allows you to work on each client individually. When you click on the client, notice that the client's row is white and all other client rows are blue. However, the action you take on a single client can be passed to all clients in the list or to some clients using the buttons to the right in the tab.
Warning icon		The yellow flag icon indicates that the selected client's information is different than the other clients in the list for this group service. The icon is displayed to the left of each field that contains different values.
Procedure		Identifies the procedure code used to bill for the group service.
Start		Identifies the scheduled start time of the group service.
Duration		Identifies the amount of time by unit that the group service takes.
End		Identifies the scheduled end time for the group service.
Time In		Identifies when the client arrived for the group service.

Time Out		Identifies when the client left the group service.
Status		Identifies the client's status for this group service.
Cancel Reason		If cancelled is selected in the Status drop down, a *Cancel* reason is required. The *Cancel Reason* drop down list becomes active if you choose cancelled in the Status field.
Program		Identifies the program that is assigned to the group service.
Clinician		Identifies the clinician identified for the group service.
Attending		Identifies the attending physician for the group or client.
Billable		Identifies whether or not the group service is billable. If the Billable check box is deselected, the group service does not create a charge and will not be included on a bill to the payer.
Set All button 		When you make a change in a field for a selected client, you can cascade the change to all clients in the list by clicking the **Set All** button. No changes appear on the screen when you click this button, but if you select a client's row, you will see that the information in the field was changed. The button is grayed out for any field that you cannot edit.
Set Some button 		When you make a change in a field for a selected client, you can cascade the change to specific clients in the list by clicking the **Set Some** button. When you click the *Set Some* button, the "" window is displayed. Select the clients whose information you want to change. No changes appear on the screen when you click this button, but if you select a client's row, you will see that the information in the field was changed. The button is grayed out for any field that you cannot edit.
Custom Fields tab		
Billing Diagnosis tab		

Group Services List Page Field Definitions



Group	Clients	Status	Date	Program	Staff 1	Staff 2	Staff 3	Staff 4
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A&D Behavior...	2	Show	12/03/2015 01:00 PM	South Apar...	Freiley, Sus...			
A&D Behavior...	4	Show	03/18/2016 01:00 PM	South Apar...	Freiley, Sus...	Freiley, CSu...		
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ACT vGroup	5	Show	01/10/2016 09:00 AM	Adult Inpa...	Avila, Stace...	Avila, Syste...	Freiley, Sus...	Stone, Susan
ACT vGroup	5	Scheduled	03/29/2016 09:00 AM	Adult Inpa...	Freiley, Sus...	Stone, Susan		
AP-Group	2	Show	01/11/2016 08:00 AM	Brookhaven...	Freiley, Sus...	Stone, Susan		
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AP-Group	2	Show	01/26/2016 08:00 AM	Brookhaven...	Freiley, Sus...	Stone, Susan		
AP-Group	3	Show	03/15/2016 08:00 AM	Brookhaven...	Freiley, Sus...	Mauritz, Kat...		
Brown, Garre...	5	Show	02/16/2016 06:00 AM	MAU Shelte...	De La Fuente...	Ynclan, Beck...		
Clubhouse	11	Show	12/07/2015 09:00 AM	South Subu...	Garcia, Kyla	Freiley, Sus...		
Clubhouse	11	Show	01/04/2016 02:00 PM	South Subu...	Andes, Cynth...			
Clubhouse	5	Show	01/26/2016 04:00 PM	South Subu...	Freiley, Sus...			
Clubhouse	3	Show	01/26/2016 04:00 PM	South Subu...	Freiley, Sus...			
Coping Skill...	5	Scheduled	03/30/2016 12:30 PM	Adult Ment...	Basevitz, Tr...	Spencer, Kim		
Day Services	3	Scheduled	12/04/2015 02:00 PM	TRI Servic...	Avila, Stace...			
Day Services	3	Scheduled	12/11/2015 02:00 PM	TRI Servic...	Avila, Stace...			

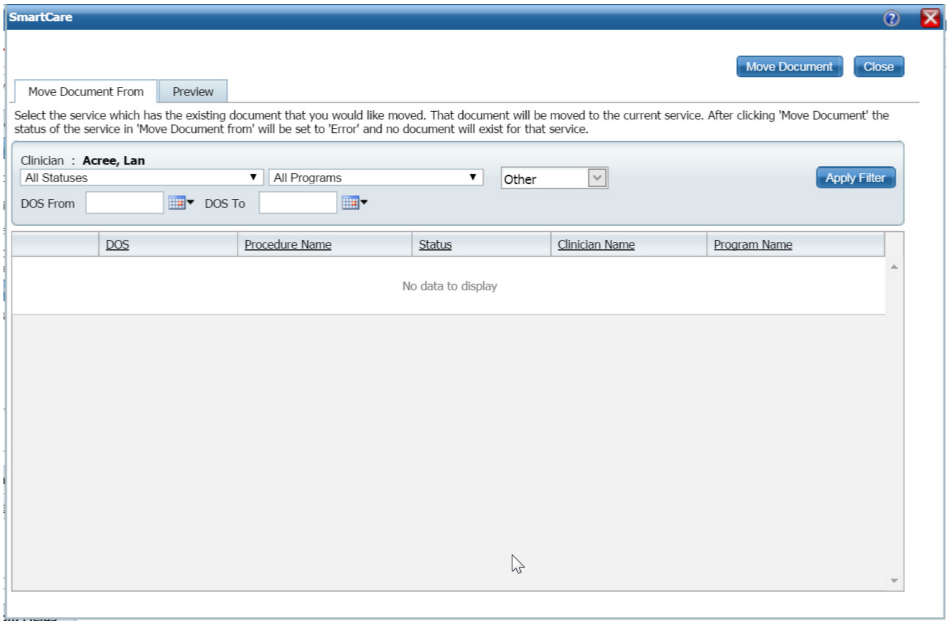
A **Yes** in the *Required?* column below identifies those fields that are required in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Required?	Description
Filter		
All Group Type		Select from the drop-down list to filter data to display below. Options are: • All Group Types • Choose from a list of all group types in the system
All Groups		Select from the drop-down list to filter data to display below. Options are: • All Groups • Choose from a list of all groups in the system
All Staff		Select from the drop-down list to filter data to display below. Options are: • All Staff • Choose from a list of all staff members in the system
All Statuses		Select from the drop-down list to filter data to display below. Options are:

		• All Statuses • Scheduled • Scheduled and Show • Complete
All Programs		Select from the drop-down list to filter data to display below. Options are: 1 All Programs 2 Choose from a list of all programs in the system
Custom		Select from the drop-down list to filter data by date to display below. Options are: • Today • This Week • Next Week • Last Week • This Month • Next Month • Last Month • Custom - select this option to set a range of dates in the *From* and *To* fields.
From		If you chose *Custom* in the previous drop down list, use the calendar icon to choose a beginning of group services to display.
To		If you chose *Custom* in the previous drop down list, use the calendar icon to choose an end for group services to display.
Other		Select from the drop-down list to filter the data to display below. Options are: • Other • Is this a custom list???
List		
Group		Identifies the name of the group, Click the hyperlinked group name to modify the group information.
Clients		Identifies how many clients are scheduled to attend the group service.
Status		Identifies the status of the group service. Statuses are:

		• Scheduled • Show • Complete • Cancelled???
Date		Identifies the scheduled date of service.
Program		Identifies the program that the clients are enrolled in.
Staff 1		Identifies the first staff member who may lead the meeting.
Staff 2		Identifies the first staff member who may lead the meeting.
Staff 3		Identifies the first staff member who may lead the meeting.
Staff 4		Identifies the first staff member who may lead the meeting.

Move Document Window Field Definitions

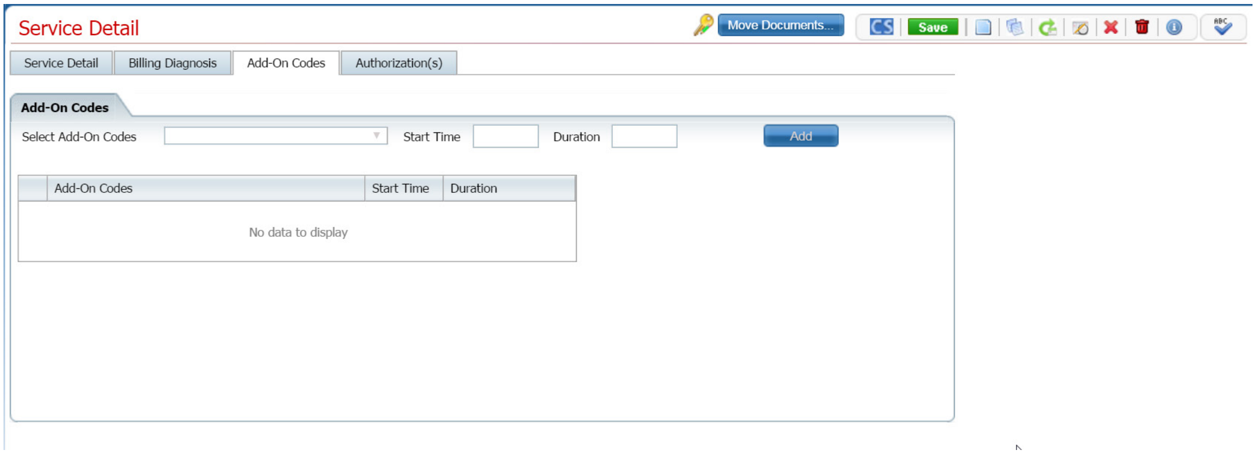


A **Yes** in the *Required?* column below identifies those fields that are required in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Required?	Description
Move Document From Tab		
Clinician		Displays the clinician name that is assigned to the client service on the *Service Detail* page.
All Statuses		Select the status for the service you want to view from the drop-down list. Options are: • Scheduled • Show • No Show • Cancel • Complete • Error
All Programs		Select the program the client is enrolled in to filter the sercvices you want to view from the drop-down list. Options are: • All Programs

		• Choose from one of the programs defined in the system
Other		Select other criteria from the drop down list to filter the services to view. Options are: • Custom???
DOS From		Identifies the starting date of service that you want to search from. Use the calendar icon to select the date.
DOS To		Identifies the ending date of service that you want to search from. Use the calendar icon to select the date.
List		
The service(s) that match you filter are displayed in the list section of the window.		
DOS		Identifies the date of service.
Procedure Name		Identifies the procedure code that defines the service.
Status		Identifies the status of the service.
Clinician Name		Identifies the clinician's name assigned to the service. Can they move a document from a different clinician?
Program Name		Identifies the program name that the client was enrolled in for the date of service.
Preview Tab		
Use the preview tab to view the information in the service document before you move it to ensure it is the correct document.		
Client		Identifies the client who the document belongs to.
Effective Date		Identifies the effective date of the document.
Author		Identifies who created the document.
Status		Identifies the status of the document.

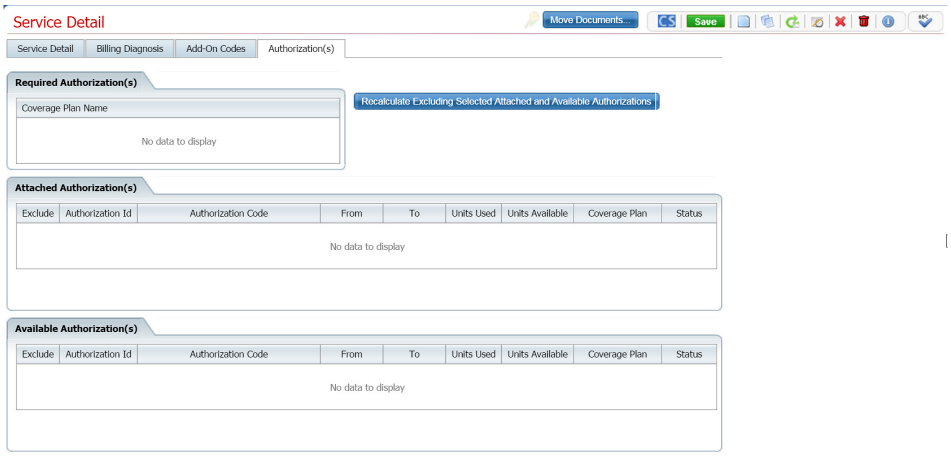
Service Detail Page Add-On Codes Tab Field Definitions



A **Yes** in the *Required?* column below identifies those fields that are required in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Required?	Description
Add-On Codes		
Select Add-On Codes		If the procedure code entered on the *Service Detail* tab is set up to allow add-on codes, the *Select Add-On Codes* field is active. Click the **drop down arrow** to add-on codes. **Tell me how...**
Start Time		Identifies the start time for the service that you are adding the add-on code(s) to.
Duration		Identifies the number or amount of units of duration you are adding to the service for the add-on codes service. When you select the add-on code, the description of the duration units is displayed to the right of the *Duration* field.
List		
		Click the  icon to delete an add-on code that has been added to the service,
Add-On Codes		Identifies the name of the add-on code(s) that were added to the service.
Start Time		Identifies the start time for the service.
Duration		Identifies the duration or amount of service added to the original client service.

Service Detail Page Authorization(s) Tab Field Definitions

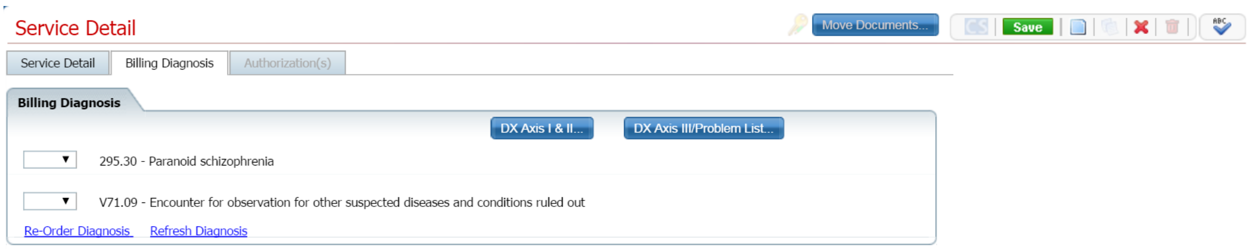


A **Yes** in the *Required?* column below identifies those fields that are required in the Core SmartCare system. Your system may have been customized to require additional fields.

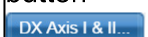
Field	Required?	Description
Required Authorization(s)		
Coverage Plan Name		Identifies any coverage plan for this client that requires authorization for the service.
Attached Authorization(s)		
Exclude		What is this???
Authorization Id		Identifies the system-assigned ID for the authorization code.
Authorization Code		Identifies the name of the authorization code.
From		Identifies the date when the authorization code became active.
To		Identifies the date when the authorization code is no longer active???
Units Used		Identifies the number of units used for this service.
Units Available		Identifies how many units are still??? available.
Coverage Plan		Identifies the client's coverage plan that requires authorization for this procedure.
Status		Identifies the status of the service???
Available Authorization(s)		
Exclude		What is this???
Authorization Id		Identifies the system-assigned ID for the authorization code.
Authorization Code		Identifies the name of the authorization code.
From		Identifies the date when the authorization code became active.
To		Identifies the date when the authorization code is no longer active???

Units Used		Identifies the number of units used for this service.
Units Available		Identifies how many units are still??? available.
Coverage Plan		Identifies the client's coverage plan that requires authorization for this procedure.
Status		Identifies the status of the service???

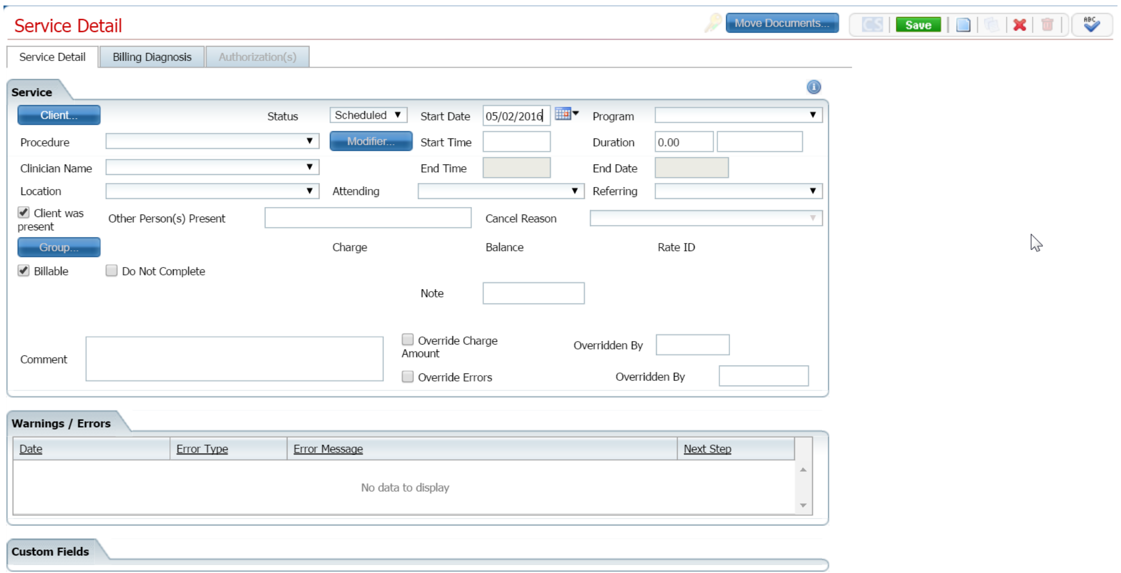
Service Detail Page Billing Diagnosis Tab Field Definitions



A **Yes** in the *Required?* column below identifies those fields that are required in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Required?	Description
Billing Diagnosis		
DX Axis I & II button 		Click the **DX Axis I & II** button to add a diagnosis code to the list. Tell me how...
DX Axis III/Problem List button 		Click the **DX Axis III/Problem List** button to add a Axis III diagnosis code to the list. Tell me how...
List of diagnosis codes		Identifies the diagnoses assigned to the client.
Sequence drop down list 		Use the drop down to set an order hierarchy to the diagnosis codes.
Re-order Diagnosis		After you have assigned an order to the diagnosis codes click the hyperlink to display the diagnoses in the order you assigned.
Refresh Diagnosis		To clear the order you assigned to each diagnosis, click this hyperlink.

Service Detail Page Service Detail Tab Field Definitions



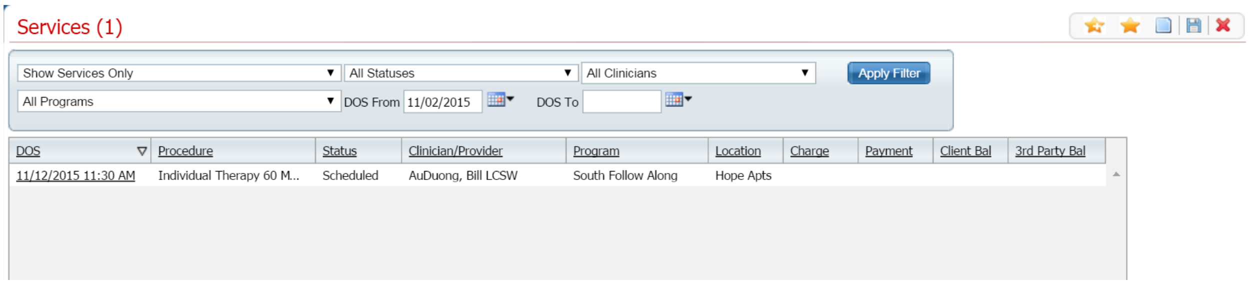
A **Yes** in the *Required?* column below identifies those fields that are required in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Required?	Description
Service		
Client button 		Click the **Client** button to display the *Search for a Client* page. Tell me how... When you select a client from the Client Search page, the client name does not appear in the Service Detail page until you click the Client button again.
Status		Select the status for this service from the drop-down list. Options are: • Cancel • Complete • Error • No Show • Scheduled • Show
Start Date		Identifies the start date for the service .The current day's date is defaulted. Use the calendar icon to select a date.
Program	Yes	Identifies the program that the client is enrolled in for this service. Select a program from the drop-down list.

Procedure	Yes	Identifies the procedure code for the service being added. Select from the drop-down list.
Modifier button 		Identifies a code added to modify the service provided. The button is only active if the procedure code for the service has modifiers added to it. Click on the **Modifier** button to select a modifier code. Tell me how...
Start Time		Identifies the start time of the service on the date selected in the *Start Date* field. Type the time in the ##.##.## format followed by an **a** for a.m. or **p** for p.m. When you move the cursor to the next field, the time is displayed in the field.
Duration	Yes	Identifies the duration for the service. The system calculates the duration using the *Start Date* and *Time* and the *End Date* and *Time*.
blank field		Displays the unit of measurement for the service procedure code.
Clinician Name	Yes	Identifies the clinician who provided the service. Select the clinician from the drop-down list.
End Time		Identifies the time when the service ended. Grayed out. When active???
End Date		Identifies the date when the service was completed. Grayed out. When active???
Location	Yes	Identifies the location where the service took place. Select the location from the drop-down list.
Attending		Identifies the client's attending physician for this visit. Select the attending physician from the drop-down list.
Referring		Identifies the person who referred the client. Select the referring person from the drop-down list.
Client Was Present		Identifies whether or not the client was present for the service. The check box defaults to Client was present. Deselect the check box if the client was not present for the service. Example???
Other Person(s) Present		Identifies if other people were present for the service. Type the relationship of any other person(s) who was present for the service. You can enter up to 244 characters in this field.
Cancel Reason	Yes, if the Status is Cancel	If the service was cancelled, identifies the reason for the cancellation. When you select a status of *Cancel* in the *Status* drop down list, the *Cancel Reason* field becomes active. Click on the **drop down arrow** to select a cancellation reason.
Group button 		Identifies whether the service involved a group of clients. Click the **Group** button to identify the group this client was involved with. Tell me how...
Billable		Identifies whether or not the service is billable to the client. The check box defaults to *Billable for this service*. Deselect the check box to make the service non-billable.
Do Not Complete		Identifies what???
Note		Displays any flags that have been assigned to this client.
Comment		Enter a comment about this service. You can enter an unlimited number of characters in this field.
Override Charge		Identifies whether you want to override the charge amount for this service. Select the check box to display a blank field where you can

Amount		enter the amount you are charging for the service.
Overridden By		The user's sign on name is displayed if you enter an override amount.
Override Errors		Identifies that you want to override errors in creating billing charges and billing for this service. Select the check box to override any errors.
Overridden By		The user's sign on name is displayed if you select the option to override errors check box.
Warnings/Errors		
Date		Identifies the date of any warnings or errors for this service. Where do these come from???
Error Type		Identifies the error type. Where does the description come from system or carrier???
Error Message		Identifies the explanatory text about the error message.
Next Step		Identifies the next step that is needed to rectify the warning or error message.
Custom Fields		
Customer Fields		Any fields added to the system for your facility are displayed in this section.

Services for a Client List Page Field Definitions



A **Yes** in the *Required?* column below identifies those fields that are required in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Required?	Description
Filter		
Show Services Only		Select from the drop-down list to filter data as shown below. Options are: • Show Services Only • Show Services and Care Mgmt Claims • Show Care Mgmt Claims Only
All Statuses		Select from the drop-down list to filter data as shown below. Options are: • All Statuses • Canceled and No Show Services • Complete Services • Scheduled Services • Show Services
All Clinicians		Select from the drop-down list to filter data as shown below. Options are: • All Clinicians • Choose a clinician from the list of all clinicians in the system
All Programs		Select from the drop-down list to filter data as shown below. Options are:

		• All Programs • Choose a program from the list of all programs in the system
DOS From		Select a beginning date to view services by date of service.
DOS To		Select an ending date to view services by date of service.
List		
DOS		Identifies the date when the service occurred.
Procedure		Identifies the procedure that was performed.
Status		Identifies the status of the service.
Clinician/Provider		Identifies the clinician or provider who provided the service.
Program		Identifies the program the client was enrolled in for the service.
Location		Identifies the location where the service was performed.
Charge		Identifies the dollar amount charged for the service.
Payment		Identifies any payment made for the service.
Client Bal		Identifies the client's current balance. Or balance as of the date of service???
3rd Party Bal		Identifies any balance owing from a third party payer.

Use the My Calendar Page

Various functions in SmartCare display the *My Calendar* page. Using the *My Calendar* page is the same regardless of where you accessed the page from.

From the *My Calendar* page, you can:

Display the Calendar for a Different Staff Member

Create a Staff Group to Display Calendars for a Group

Display Calendars for a Group

Display Calendars for Multiple Selected Staff Members

Change the Intervals to View on a Calendar

Add a New Calendar Entry on a Calendar

Add a New Service Entry on a Calendar for a Client

Add a New Primary Care Entry on a Calendar for a Client

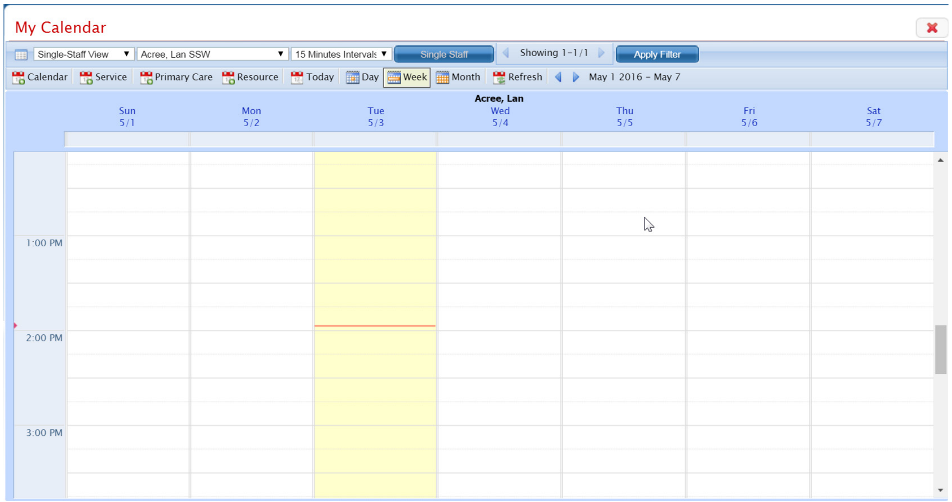
Add a New Resource Entry on a Calendar

Change the View of the Calendar(s)

To Display the Calendar for a Different Staff Member

When you access the *My Calendar* page from the *Service Detail* page for a specific client, the client's assigned staff member's calendar is displayed. You can change whose calendar is displayed.

1. Make sure the *My Calendar* page is displayed. View field definitions.



Note: if you accessed the *My Calendar* page from a specific client's record, the staff member assigned to that record is displayed in the second drop down list and the first drop down list displays the *Single-Staff View* option.

2. To select a single staff member, make sure the **Single-Staff View** is selected in the first drop down list.

3. Select the **staff member** whose calendar you want to display from the second drop down list.

4. Click the **Apply Filter** button.

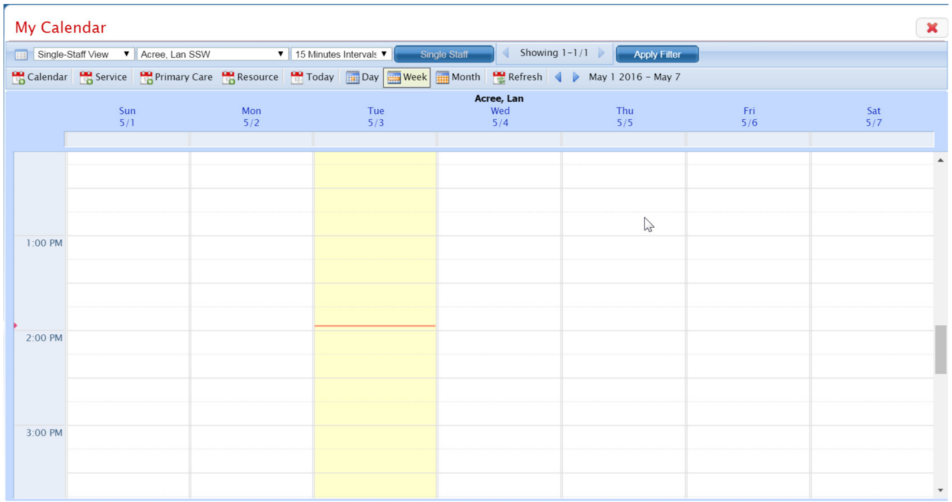
   The selected staff member's calendar is displayed.

5. Continue working with the calendar.

6. When you are done working with the calendar, click the **Exit**  icon to exit from the My Calendar page.

Create a Staff Group to Display Calendars for a Group

1. Make sure the *My Calendar* page is displayed. View field definitions.



Note: if you accessed the *My Calendar* page from a specific client's record, the staff member assigned to that record is displayed in the second drop down list and the first drop down list displays the *Single-Staff View* option.

2. From the first drop down list, select the **Multi-Staff View** option.

3. Notice the **second drop down list** is blank and the *Single Staff* button is changed to *Define Group* and is active.

4. Click the **Define Group** button.

   The *Define Group* window is displayed. View field definitions.

5. Type a **name** that identifies the group of staff in the *Staff View Name* field.

6. In the *Define View* section, select the **staff members** you want to add to the group. Or, click the **All** check box to select all staff members listed.

7. Click the **Insert** button.

   The group is saved and listed in the *Staff View* section.

8. Click the **Save** button to save your work.

9. Click the **Close** button to close the window.

   The *My Calendar* page is displayed.

10. Notice that the **second drop down list** is now called *Select Group.*

11. Change the intervals on the calendar, if needed.

12. Click the **Apply Filter** button.

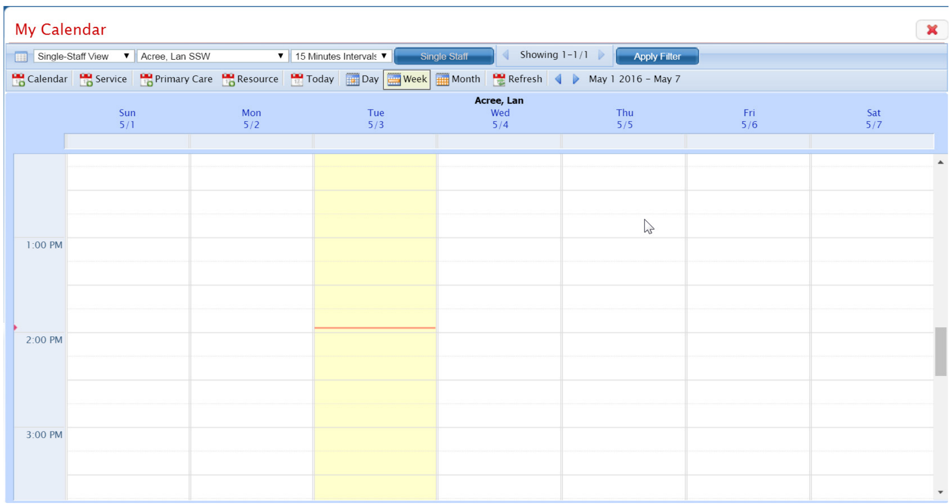
The calendar for each staff member in the group is displayed.

13. Continue working with the calendar.

14. Click the **Exit** icon to exit from the *My Calendar* page.

Display Calendars for a Group

1. Make sure the *My Calendar* page is displayed. View field definitions.



2. Click on the drop down arrow in the **Select Group drop down list** and select the group whose calendars you want to display.

3. Change the intervals on the calendar using the third drop down list, if needed. Tell me how...

4. Click the **Apply Filter** button.

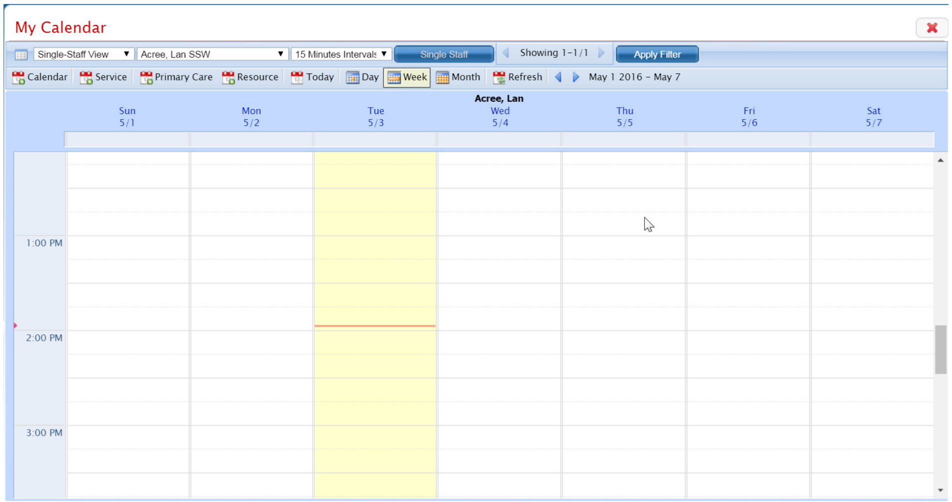
   The calendar for each staff member in the group is displayed.

5. Work with the calendars.

6. Click the **Exit** icon to exit from the *My Calendar* page.

Display Calendars for Multiple Selected Staff Members

1. Make sure the *My Calendar* page is displayed. View field definitions.



2. Click on the drop down arrow in the **first drop down list** and select the **Multi-Staff Selected** option.

   The *second drop-down list* is grayed out. The button is changed to **Select Multiple Staff** and is active.

3. Change the **intervals** on the calendar using the *third drop down list*, if needed. [Tell me how...]

4. Click the **Select Multiple Staff** button.

   The *Staff List* window is displayed.

5. Select the **staff** whose calendars you want to display.

6. Click the **OK** button.

   The *Staff List* window is displayed.

7. Click the **Apply Filter** button.

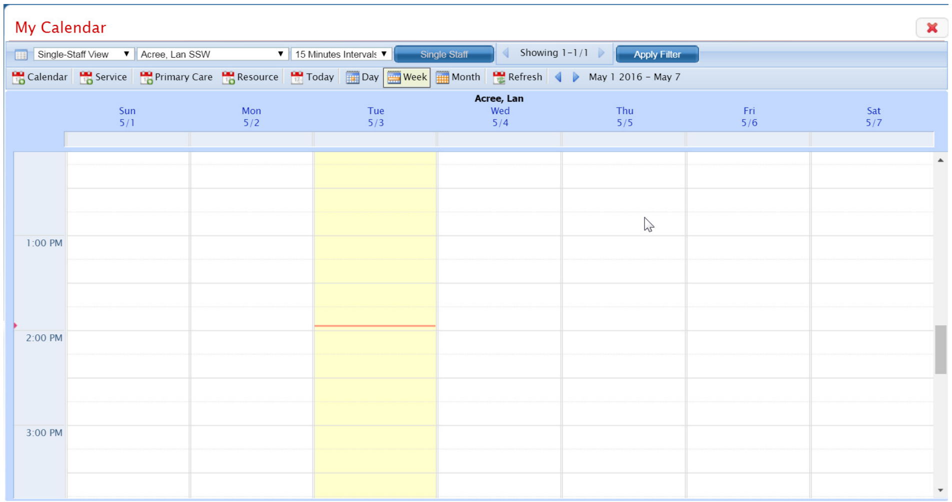
   The calendars of the staff members you selected are displayed.

8. Work with the calendars.

9. When you are done working on calendars, click the **Exit**  icon to exit from the *My Calendar* page.

Change the Intervals to View on a Calendar

1. Make sure the *My Calendar* page is displayed. View field definitions.



2. In the third drop-down list, select the time interval you want to display in the calendar(s). See the red box in the screen image below for the interval drop down list.

3. Make other changes in the drop down lists, if needed.

4. Click the Apply Filter button.

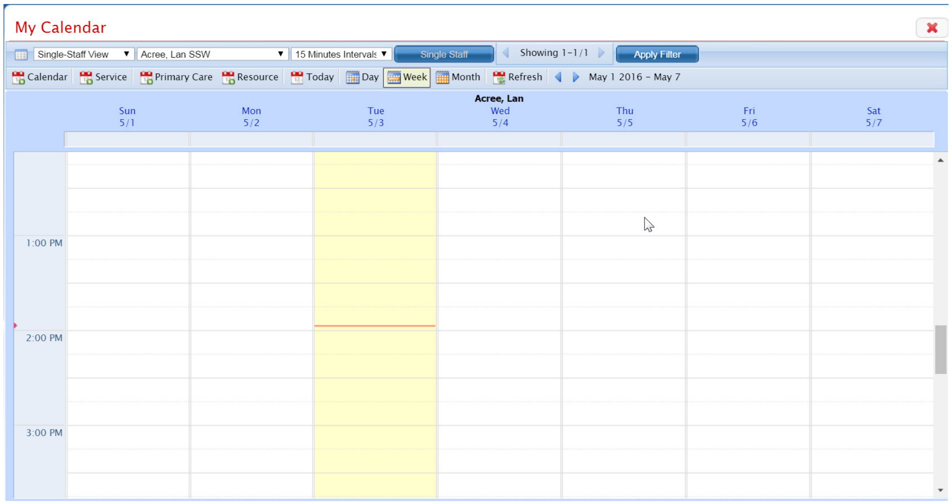
   The calendars are displayed with the time intervals you selected.

5. Work with the calendars.

6. When you are done working on calendars, click the **Exit**  icon to exit from the *My Calendar* page.

Add a Service Note for a Client on a Calendar

1. Make sure the *My Calendar* page is displayed. View field definitions.



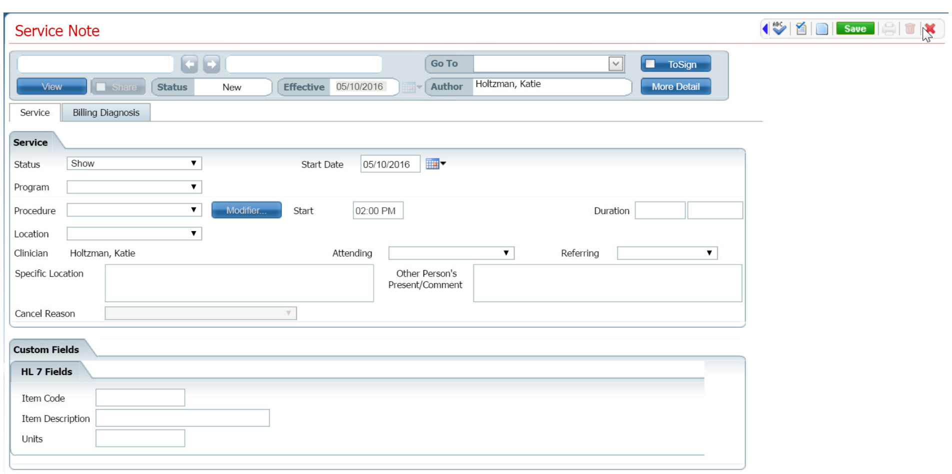
Note: if you accessed the *My Calendar* page from a specific client's record, the staff member assigned to that record is displayed in the second drop down list and the first drop down list displays the *Single-Staff View* option.

1. If your calendar is not displayed, select your name from the second drop down list.
2. Make other changes as needed in the *Filter* fields.
3. Click the **Apply Filter** button.

Your calendar should be displayed.

1. Click the **Service** button in the calendar task bar.

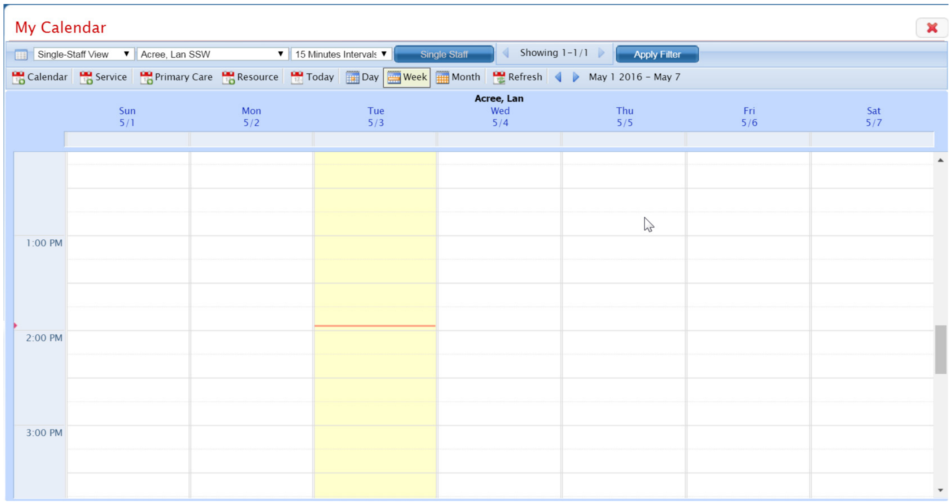
The *Service Note* page is displayed.



Complete the Service Note page. View field definitions.

Add a New Calendar Entry on a Calendar

1. Make sure the *My Calendar* page is displayed. View field definitions.



Note: if you accessed the *My Calendar* page from a specific client's record, the staff member assigned to that record is displayed in the second drop down list and the first drop down list displays the *Single-Staff View* option.

1. If your calendar is not displayed, select your name from the second drop down list.
2. Make other changes as needed in the *Filter* fields.
3. Click the **Apply Filter** button.

   Your calendar should be displayed.

Add a New Service Entry on a Calendar for a Client

Add a New Primary Care Entry on a Calendar for a Client

Add a New Resource Entry on a Calendar

Change the View of the Calendar(s)